OPPORTUNITIES FOR TOURISM DEVELOPMENT IN ALASKA RURAL GATEWAY COMMUNITIES

Opportunities for Tourism Development in Alaska Rural Gateway Communities

Final Report to RMRS under Agreement 03-CS-302

By Ginny Fay[1], Eco-Systems: Ecological and Economic Research, SuzAnne Miller[2], Dunrovin Research, and Daniel W. McCollum[3], Rocky Mountain Research Station

February 2005

03 - CS-11221617-302

[1]Ginny Fay
Eco-Systems
1101 Potlatch Circle
Anchorage, Alaska 99503
907-333-3568
fax: 907-333-3586
email: ginnyfay@earthlink.net

[2]SuzAnne M. Miller
Dunrovin Research
P. O. Box 822
5375 Terry Lane
Lolo, Montana 59847-0822
406-273-7745
FAX: 406-273-5421
email:dunrovin@bigsky.net

[3]Daniel W. McCollum
Rocky Mountain Research Station
2150-A Centre Ave, Suite 350
Fort Collins, CO 80526-1891
970-295-5962
fax: 970-295-5959
e-mail: dmccollum@fs.fed.us

Introduction

In an effort to expand opportunities for tourism business development in Alaska national parks, the National Park Service, Alaska Region, along with the Forest Service and other federal agencies, is conducting research in cooperation with Alaska Village Initiatives to explore visitor patterns and traveler preferences in rural Alaska. As part of that objective, this report provides information on visitor markets and Alaska visitors. The background section provides information on travel markets including trends and outlooks in national and Alaska markets. The focus is primarily nature-based and cultural tourism, most pertinent to Alaska rural tourism development. This is followed by specific results from the Alaska Visitor Statistics Program including characteristics of Alaska visitors, how they obtain their information for trips to Alaska, their willingness to pay for travel to rural Alaska, and expenditure patterns of various Alaska visitor segments. This information is intended to support the development of successful businesses and business plans in rural Alaska by helping rural residents better understand potential markets and visitors. The section on Targeting Cultural, Wilderness and Ecotourism Market Segments provides specific actions that communities, businesses and federal agencies could do to expand rural business opportunities in public land gateway communities. More detailed tables of information are provided in four appendices at the end of the report.

Background

Continued Market Recovery

The market in recent years has not been conducive to efforts aimed at expanding rural market niches in Alaska. The economic recession followed by terrorist bombings and the invasion of Iraq discouraged both pleasure and business travel and tended to keep people closer to home. Similar to other years of international unrest, however, Alaska fared better than many U.S. destinations after September 11, 2001. Alaska is an "exotic" destination for the well-traveled who want more than a weekend excursion to the county fair or amusement park, but prefer the safety of a domestic destination. 2000 and 2001 were particularly sluggish years for travel to Alaska but travel began to pick up in 2003. In 2004, Alaska saw an 8 percent increase in visitation pushed, in part, by a 12 percent increase in cruise passengers.

After years of little growth in travel volume combined with significantly lower travel spending, 2004 showed recovery nationally as well. According to the Travel Industry Association's (TIA) *Annual Travel Forecast*, overall traveler spending by domestic and international visitors in the U.S. is expected to increase 6.9 percent in 2004 to nearly $593 billion up from $555 billion in 2003.[1] A forecasted 5.3 percent increase in 2005 will bring expenditures to around $624 billion.

After falling steadily for three years, international arrivals to the U.S. are expected to rise 7.5 percent in 2004 and nearly 5 percent in 2005. This translates into more than 43 million international arrivals by the end of 2004 and almost 46 million in 2005. However, these numbers remain well below the

[1] Travel Industry Association of America, *Annual Travel Forecast*, Fall 2004.

record high of 51 million in 2000. International traveler spending in the U.S. is expected to increase 11.2 percent in 2004, to nearly $72 billion and increase nearly 8 percent in 2005 to over $77 billion. Once again, these spending levels are well below the $82 billion spent by international visitors in 2000. However, as the U.S. dollar continues to fall against foreign currencies, international visitation to the U.S. may increase even more than expected. While a relatively small portion of Alaska's visitors are international, they tend to take longer vacations, travel more off the beaten track, and spend at higher daily rates than domestic travelers to Alaska.

Domestic leisure travel has slowly but steadily increased over the years, despite the aftermath of September 11, 2001, the lagging economy, the war in Iraq, and high gas prices. TIA forecasts leisure travel volume will grow 2.9 percent in 2004 up from a 1.9 percent increase in 2003. It will increase once again in 2005 by nearly 2 percent. While some recent shifts in consumer preferences such as a desire to travel closer to home remain, Americans are now returning to their more traditional habits including increases in air travel. Renewed confidence in air travel is essential for stimulating travel to rural Alaska.

Market Segments

There are a number of travel market segments that are pertinent to rural tourism in Alaska including cultural, adventure, geotourism and ecotourism. There is considerable overlap in these sectors with their primary common attribute being the interest of the traveler in a learning experience; learning is often a primary motivation for the traveler to take the trip. Many are also interested in "sustainable" tourism and the well-being of the environment and the people living in the places they visit. The extent to which each of these aspects is a primary motivator distinguishes the groups. The depth of commitment also varies among the groups with the "soft" adventure and "soft" ecology orientation versus the "hardcore" enthusiasts who can be distinguished by not only their consciousness and interest but their willingness to alter their behavior or select companies based on business practices.

These subtle distinctions in visitor type might not be significant for Alaska as a whole but they can be extremely important for rural tourism development. For example, many small villages have limited interest and ability to host more than a relatively small number of visitors. It also requires a careful "matching" of visitors sensitive to and interested in differences in culture and place to make the experience rewarding for both guests and hosts. This requires refined and strategic business development and marketing. The visitor segments offering the most promise for rural Alaska economic development in communities interested in tourism are briefly discussed below.

Cultural and Historic Tourism

A study from the Travel Industry Association of America (TIA) and Smithsonian Magazine shows continued and growing interest in travelers' desire to experience cultural, arts, historic and heritage activities. Study results show that a remarkable 81 percent of U.S. adults who traveled in the past year, or

118 million, identify themselves as historic/cultural travelers.[2] These travelers included historical or cultural activities on almost 217 million person-trips in 2003, up 13 percent from 192 million in 1996. (A person-trip is one person on one trip traveling 50 miles or more from home, one way.)

These historic/cultural travelers spend more money on their trips compared to the average U.S. trip (an average of $623 vs. $457, excluding cost of transportation), making historic/cultural travelers a lucrative market for destinations and attractions. For 30 percent of historic/cultural travelers, their choice of destination was influenced by a specific historic or cultural event or activity.[3]

Compared to the average trip in the U.S., historic/cultural trips are more likely to be seven nights or longer and include air travel, a rental car, and a hotel stay. Historic/cultural travelers are also more likely to extend their stay to experience history and culture at their destination. In fact, four in ten added extra time to their trip specifically because of a historic/cultural activity.

Many historic/cultural travelers agree that trips that include cultural, arts, historic, or heritage activities or events are more enjoyable to them than trips that do not (39%) and that they prefer to visit destinations that have some historical significance (38%). Three in ten agree it is important that the trips they take for vacation or leisure provide cultural experiences. A select group feels that a leisure or vacation trip away from home is not complete without visiting a museum, historic site or landmark (26%) or attending a cultural event or arts performance (17%).

Nature-Based Tourism
Nature-based, adventure, geotourism and ecotourism sub-sectors all hold considerable potential for gateway communities. While quite similar, there are subtle differences among these visitor categories. A smaller subset of the larger nature-based tourism group is ecotourism. The International Ecotourism Society definition and principles of ecotourism are:[4]

"Responsible travel to natural areas that conserves the environment and improves the well-being of local people." This means that those who implement and participate in ecotourism activities should follow the following principles:

- Minimize impact
- Build environmental and cultural awareness and respect
- Provide positive experiences for both visitors and hosts
- Provide direct financial benefits for conservation
- Provide financial benefits and empowerment for local people

---

[2] The survey may have asked people to identify themselves in such a way that the group included those with a relatively minor interest as well as those that culture and history are the primary motivator for their travel choices.
[3] It is likely that the expenditure differences would be even greater if this latter 30 percent were compared to the other 70 percent rather than comparing the entire 81 percent with the average of all travelers.
[4] www.ecotourism.org/index2.php?what-is-ecotourism

These principles effectively "raise the bar" for both visitors and businesses offering these travel opportunities. Travelers who define themselves as "ecotourists" include learning as part of their reason to travel. They generally are also motivated to reduce the negative impacts of their travel while increasing the benefits to the local area they visit. For some communities, especially smaller villages, this type of "sensitive" traveler may be the only type that is tolerable for their community size and culture. Development, marketing and management of tourism can be strategically structured to match communities with the niche markets and visitors appropriate for the type of visitation each community desires.

Ecotourism is considered to be one of the fastest growing tourism sub-sectors. Several factors are believed to be driving this increase including:[5]

- Increases in the overall travel market.
- Growth in popularity of vacations to natural areas, particularly to parks.
- Massive dissatisfaction with the simplistic travel packages offered by travel firms and facilities.
- Urgent need to generate funding and human resources for the management of protected areas in ways that meet the needs of local rural populations.
- Recognition of the importance of tourism within the field of sustainable development.

Based on survey data collected by HLA and ARA consulting firms on North American travel consumers, The Ecotourism Society constructed the following "ecotourist" market profile.[6] Ecotourism was defined in this study as nature/adventure/culture oriented travel, thus it was broader than the narrower definition of ecotourism.

- *Age:* 35 - 54 years old, although age varied with activity and other factors such as cost.
- *Gender:* 50% female and 50% male, although clear differences by activity were found.
- *Education:* 82% were college graduates, suggesting a shift in interest in ecotourism primarily from those who have high levels of education to also include those with less education, indicating an expansion into mainstream markets.
- *Household composition:* no major differences were found between general tourists and experienced "ecotourists" (defined in the study as tourists that had been on at least one "ecotourism" oriented trip).
- *Party composition:* a majority (60%) of experienced "ecotourism" respondents stated they prefer to travel as a couple, with only 15% stating they preferred to travel with their families, and 13% preferring to travel alone.
- *Trip duration:* the largest group of experienced "ecotourists" (50%) preferred trips lasting 8-14 days.

---

[5] The Ecotourism Society, *USA Ecotourism Statistical Fact Sheet*, 1999. Available at: ecotourism.org/research/stats/files/stats-usa.pdf
[6] Ibid.

- *Expenditure:* experienced "ecotourists" were willing to spend more than general tourists, the largest group (26%) stating they were prepared to spend $1,001-$1,500 per trip.
- *Important elements of trip:* Experienced "ecotourists" listed: (1) wilderness setting, (2) wildlife viewing, (3) hiking/trekking as the most important elements of their trip.
- *Motivations for taking next trip:* Experienced "ecotourists" listed: (1) enjoy scenery/nature, (2) new experiences/places as the top two motivations.

In a recent study, TIA documented the strong feelings U.S. travelers have about preserving the natural environment as well as history and culture. TIA dubbed the term "geotourism", which they define similarly to ecotourism or ecotourism "lite". However, it does suggest a growing interest among U.S. travelers in sustainable tourism practices. The report called, *Geotourism: The New Trend in Travel*, showed that more than three-quarters of American travelers feel it is important that their visits not damage the environment. And 62 percent say it's important to learn about other cultures when they travel. Furthermore, 38 percent of travelers say they would pay more to use a travel company that strives to protect and preserve the environment. The two-part study was sponsored by National Geographic Traveler.

Findings from the *Geotourism: New Trend in Travel* study include[7]:

- One-third of all travelers are influenced by a travel company's actions to preserve the environment and/or history and culture of destinations.

- Although most travelers are concerned with price and value, 58.5 million (38 percent) Americans say they would pay more to use a travel company that strives to protect and preserve the environment. Most important, the majority (61%) of those who would pay more to use such companies would in fact pay five to ten percent more.

- Authenticity is important to travelers. Many (61%) believe their experience is better when their destination preserves its natural, historic, and cultural sites. In addition, 41 percent of travelers say their vacation experience is better when they can see and do something authentic.

- The majority of travelers are ready to act to preserve and protect our natural sites. Nearly 91 million travelers (59%) support controlling access to and/or more careful regulation of National Parks and public lands in order to help preserve and protect the environment.

- A significant number of travelers (54 million) are inclined to select travel companies that strive to protect and preserve the local environment of the destination. For a smaller group of travelers (17 million), the

---

[7] Travel Industry Association of America (TIA) and National Geographic Traveler (NGT), *The Geotourism Study: Phase 1 Executive Summary*, 2002. Based on 4300 responses to a survey of 8000 American adults, of which 3,300 had taken a trip in the last three years.

environment is top of mind when actually making decisions about which travel companies to patronize. [8]

- Millions of American travelers will buy from companies and organizations that are culturally and socially oriented. In fact, 46 million travelers buy from specific companies because they know that these businesses donate part of their proceeds to charities.

- More than half of all travelers (80 million) are aware of at least one practice employed by travel companies to preserve and protect the environment of destinations. Travelers are most often aware of companies that ask customers to reuse towels/sheets (55 million travelers) and those that use energy saving practices (46 million travelers). More than 32 million travelers are aware of travel companies that recycle and/or that use local vegetation on property grounds.

A separate study found that over 80% of American travelers believe it is important that hotels take steps to preserve the environment, but only 14% ask hotels they stay with if the hotel has an environmental policy.

Wildlife Viewing
Wildlife viewing is another opportunity that rural residents and businesses could consider expanding to increase visitation to the region. Visitors who come to Alaska primarily to view wildlife spend more time and money while visiting. [9] If done carefully and strategically, this sector could be expanded to significantly increase incomes and employment to residents while minimizing impacts to wildlife, communities and the quality of life enjoyed by rural residents. Alaska offers exceptional wildlife viewing and the market is huge and largely untapped. According to a recent US Forest Service report, over 95 million Americans over age 16 participate in wildlife viewing.[10] That is 45%, up from 31% in 1995. Not only is wildlife viewing popular, but nationally wildlife watchers spent $38 billion on equipment and travel for the primary purpose of viewing wildlife; the total economic impact is estimated to be $96 billion, with more than a million jobs and $28 billion in job income generated. The 2001 US Fish and Wildlife survey estimated that the total economic impact of wildlife viewing in Alaska is $792 million, with 13,000 jobs and $237 million in job-related income generated.

Alaskans also enjoy viewing wildlife; 170,000 Alaskans traveled within Alaska spending $81 million for the primary purpose of watching wildlife[11]—trips that

---

[8] Travel Industry Association of America (TIA) and National Geographic Traveler (NGT). "Geotourism: The New Trend in Travel," press release. 8 October 2003. This refers to the second portion of a two-part survey.
[9] Miller, SuzAnne and Daniel McCollum, *Less May Mean More: Maximizing the Economic, Environmental, and Social Benefits from Alaska's Visitors Industry*, A paper presented at a Conference on Alaska's Economy: "Can the Last Frontier Have a Sustainable Future" sponsored by the Alaska Conservation Alliance, July 22, 1999. See also McCollum, Daniel and SuzAnne Miller, 1997, *Alaska Non-resident Visitors: Their Attitudes Towards Wildlife.*
[10] Bowker, J., *Outdoor Recreation by Alaskans: Projections for 2000 through 2020*, US Forest Service, PNW-GTR-527.
[11] Bowker.

might have otherwise led to Hawaii or other out-of-state destinations. Seventy-four percent of Alaska adults consider themselves wildlife viewers and two-thirds of Alaskans who hunt also identify themselves as wildlife viewers. The US Forest Service estimates the number of wildlife viewers in Alaska will increase by 100% in the next 20 years.[12] Clearly additional investment in wildlife viewing opportunities is warranted to capture more of this market of nonresidents and keeping residents in state, as well as maintaining a quality viewing experience for visitors and residents.

Alaska Visitors and Research

The Alaska Visitor Statistics Program (AVSP) and other research have consistently shown that cultural, and nature-based tourism, including wildlife viewing, opportunities contribute more dollars per visitor day than do other types of tourism, and more of these dollars stay in Alaska. This is consistent with worldwide data showing cultural, nature-based tourism and ecotourism are some of the fastest growing and "valuable" visitor industry segments. Approximately half of the 1.5 million nonresident visitors who came to Alaska in 2001 are interested in cultural and rural tourism experiences. These same visitors spend on average about 20% more for their visits to Alaska than do other types of visitors.[13]

Alaska Visitor Statistics Program data indicate that there are a sizeable number of visitors to Alaska who are interested in visiting rural areas. The AVSP consisted of three surveys:

1. Random Arrival Survey or RAS
2. Visitor Expenditure Survey or VES
3. Visitor Opinion Survey or VOS

The Random Arrival Survey or RAS gathered information as visitors arrived on how they arrived to Alaska, what they plan to do during their visit as well as demographic information.

The Visitor Expenditure Survey or VES was an expenditure diary used to gather information as visitors traveled in Alaska. It specifically collected information on:

1. What visitors purchased in Alaska
2. Where visitors spent money in Alaska
3. How much money visitors spent in Alaska

The Visitor Opinion Survey or VOS was used to gather opinions after visitors return home from Alaska. It was used to collect a variety of information about:

1. Where visitors went in Alaska
2. What visitors did in Alaska
3. Visitors' opinions about Alaska

---

[12] Bowker, J., 2000.

[13] Alaska Visitor Statistics Program data, 2002.

Detailed information on results of additional analyses of visitor demographics, expenditures, use of advertising and trip planning, trip characteristics, and cultural and wilderness market segment visitors can be found in appendices to this report. The next sections summarize some of the most pertinent findings.

Rural and Cultural Tourism

For the 2000-2001 Alaska Visitor Statistics Program, the Alaska Village Initiative provided funding to expand the Visitor Opinion Survey to specifically collect information that would be useful to rural villages for potential tourism development. Questions were added to the survey to determine visitor:

- Interest in Alaska Native Culture and Arts
- Interest in Travel to Small Rural Communities in Alaska
- Barriers to Travel to Remote Areas
- Willingness to Pay to Visit Small Rural Communities

Interest in visiting rural Alaska was quite high with 85% of visitors saying that they would be interested in visiting rural Alaska if they traveled to Alaska again. Visitors were asked what potential cultural, fishing, outdoor recreation, and nature activities they would be interested in doing if they were to visit Alaska again. There was considerable interest in cultural activities as shown by the percentage of visitors who would be interested in:

Visiting museums/cultural center	77%
Wildlife viewing with a Native Guide	72%
Fishing with a Native Guide	49%
Learning Native village activities (e.g., berry picking)	48%
Learning Native crafts	47%
Learning Native dances, songs, stories	41%

Visitors also demonstrated these interests by the activities they did while on their trips to Alaska including the percentage who:

- Shopped for Alaska arts and crafts 78%
- Sought items with the "Made in Alaska" label 66%
- Shopped specifically for Alaska Native arts and crafts 47%
- Sought items with the Alaska Native "Silver Hands" label 16%
- Were aware that the "Silver Hands" label meant that the item was made in Alaska by Alaska Natives 24%

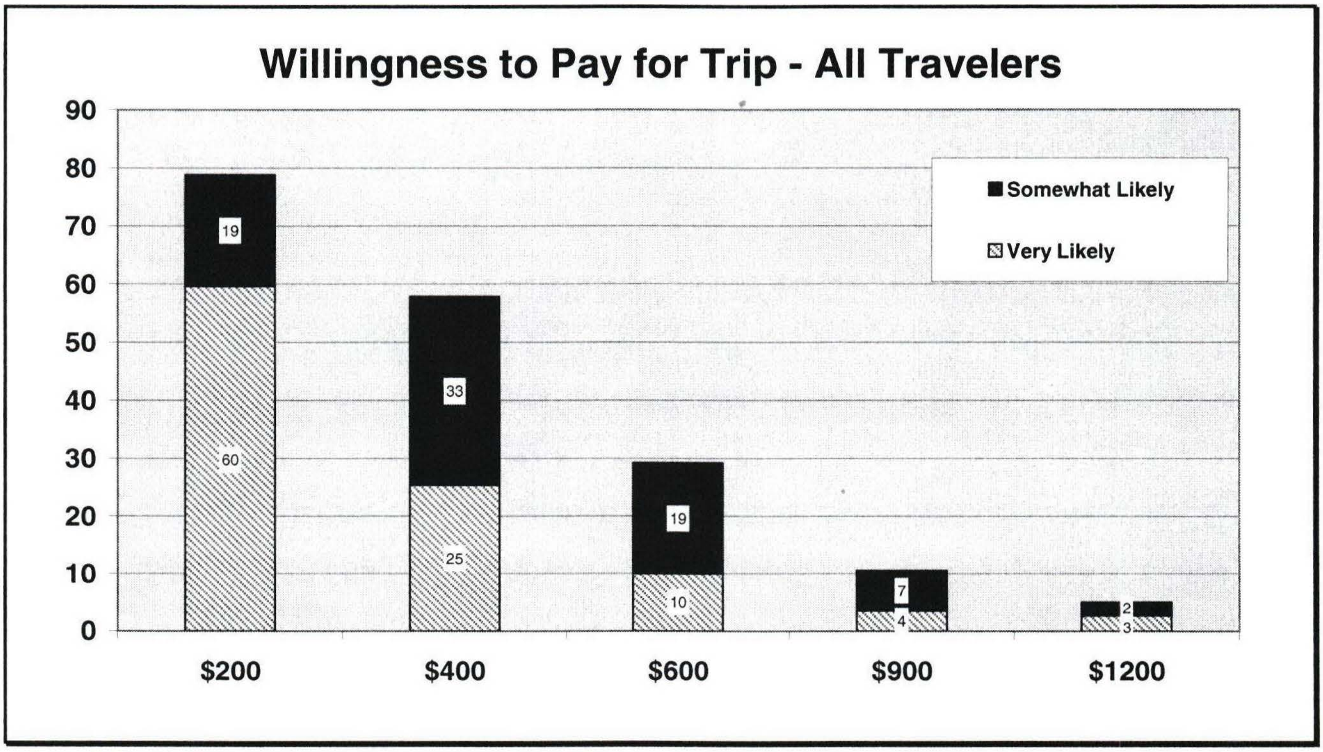
The percentages of people who said they were interested in specific activities in rural Alaska include:

- Fishing, wildlife viewing, bird watching, hunting, looking at wild flowers, or other nature activities 76%
- Be with local residents to learn about local history and ways of life? 76%
- Outdoor recreation activities like hiking, rafting, camping, mountain biking, etc.? 57%

Of the 85% of visitors who said they would be interested, only a relatively small portion would be deterred by unusual travel methods to reach rural destination such as small planes, boats, or off-road vehicles. While 26% said they would be concerned, only 18% said they would be prevented from traveling by the necessity of taking one of these unfamiliar travel methods.

Travelers willingness to pay for rural experiences appear to be quite sensitive to price. Visitors were asked:

> *If you were planning another trip to Alaska,* how likely do you think you would be to include a two day, one night trip to a small Alaska village if the cost per person for that part of your Alaska trip were each of the following amounts?



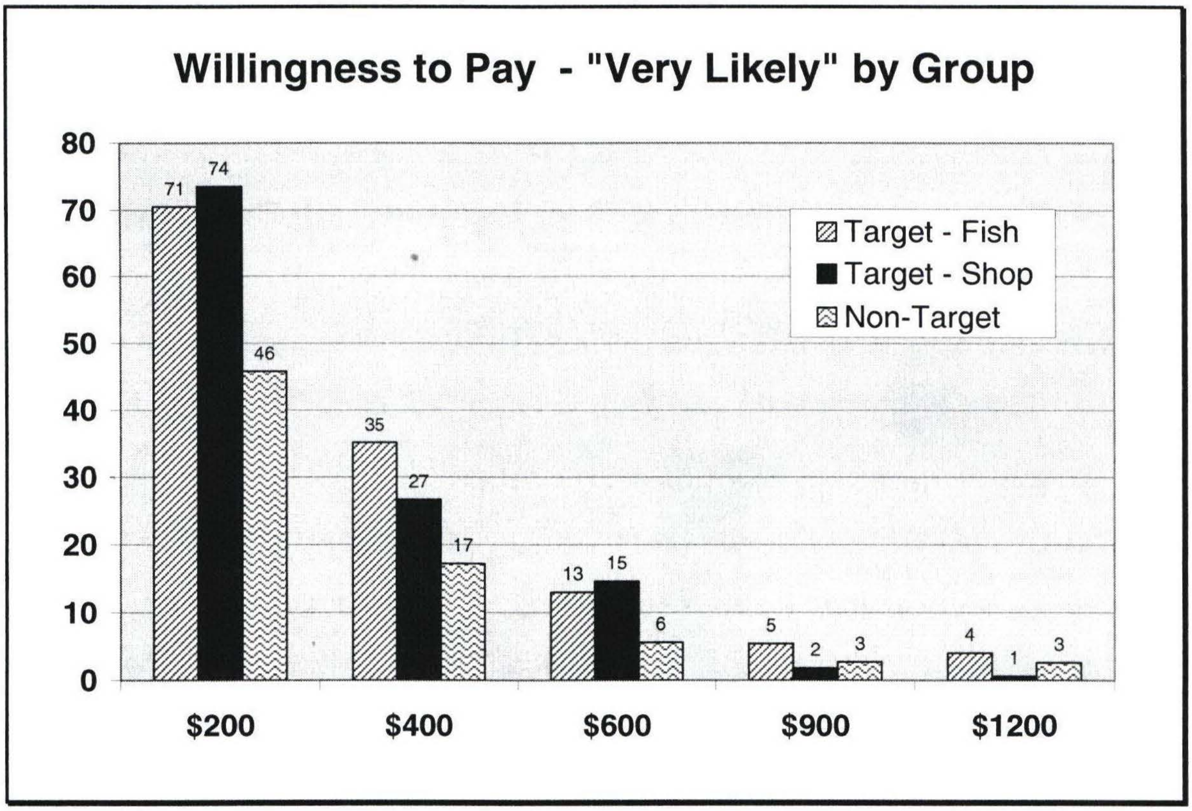
Among those who are interested in traveling to rural Alaska, there are fairly distinctive market segments. They can generally be differentiated by their interests in:

- Native culture..Culture
- Interest in Fishing with Native guide............Fishing
- Shopping for Native Arts and Crafts.............Shopping
- Have No Travel Barriers.............................Travel

The population of those who are interested in traveling to rural Alaska who would not be prevented from doing so by travel mode barriers is estimated to be approximately 51% of visitors to Alaska. How visitors answered questions related to Native culture and travel to rural areas, they were divided into

distinct groups. The groups fall into three market segments based on their interests in **Culture**, **Fishing**, and **Shopping**. The Fishing market segment is specifically interested in fishing with a Native guide. These market segments were defined by the visitors through their survey responses.

If the responses to the willingness to pay for rural travel are separated from the responses by all visitors, there is a fairly significant difference for the fishing with a Native guide and shopping for cultural items market subgroups.



As can be seen, interest declines precipitously after the $400 price interval. So while travel by unusual means might not impose a barrier, the high cost of travel and/or the price of the experience would most likely have a dampening effect on travel. Pricing for new products would have to be done carefully to appeal to most travelers, including those especially interested in these experiences.

The cultural and small community market segments:

- *Are more willing to pay for travel to rural areas*
- *Spend more money on*
  - *Made in Alaska products*
  - *Tour Packages*
  - *In-State Transportation*
  - *Recreation and Entertainment*
- *Spend more money in total in state.*

Travelers in these segments spend more than travelers in general, whether spending is measured by trip, by day or by individual. As a result the total amount spent in Alaska by these segments is a disproportionately large share of total visitor expenditures.

Expenditures during Alaska Trip

		Cultural Target	
	Non-Target	**Fish**	**Shop**
Total In-State $ Spent/Group	$1,409	$1,902	$1,604
Daily Group $ Spent	$153	$184	$161
Daily Individual $ Spent	$80	$100	$89

Total In-State Expenditures

Non-Target Group (51%)	$826 million (45%)
Target Culture/Fish (32%)	$697 million (38%)
Target Shoppers (17%)	$316 million (17%)
Total Visitors	$1,839 million

Strategies to identify and target these market segments are a challenge, however, because demographically the culture/fish segment does not differ dramatically from the non-target group (see Appendix A). Target culture/fishers are difficult to distinguish by demographics or trip characteristics except that they are more likely to return to Alaska within 5 years. However, the target shopper group is more likely to be female, slightly younger, employed full time, earn over $100,000, and a college graduate. They are also more likely to use a travel agent, make trip plans earlier, purchase a travel package, and are less likely to have been to Alaska before. Target shoppers are a little more distinctive and may potentially be reached through travel agents that cater to well educated, employed women.

The distinctions for these visitors segments is more in terms of their interests and what they like to do rather than their demographics. Their interest is specific activities and how that contrasts with the non-target group is shown below. A marketing strategy that targeted interests rather than strictly demographics would most likely be more successful at reaching these travelers.

Interest in Alaska Native Culture and Arts
Comparison of Activities – by Market Segments

	Non-	Cultural Target	
Activity	**Target**	**Fish**	**Shop**
Visiting museums	65%	91%	91%
Wildlife viewing	54%	91%	87%
Fishing	38%	100%	0%
Village activities	30%	70%	62%
Native crafts	31%	60%	71%
Native folklore	30%	56%	50%
Nature Activities	66%	88%	85%
History/Way of Life	60%	90%	90%

Outdoor Recreation	46%	65%	67%

Importance of Opportunities in Planning Alaska Trip by Market Segments
% Responding that Opportunity was Very Important

	Non	Cultural Target	
Opportunity	**Target**	**Fish**	**Shop**
Learning Alaska History	16%	52%	45%
Learning Native Culture	14%	50%	47%
Meeting Local People	14%	40%	36%

This information suggests that there is significant potential for the villages adjacent to national parks and other public lands to participate in cultural and ecotourism if they desire to do so. Of particular interest are opportunities to fish and engage in wildlife viewing opportunities with a Native guide. In addition, cultural activities including village activities, understanding history and way of life are things that many potential travelers expressed a high interest in doing. However, even the most motivated visitors are fairly price sensitive.

Importance of Wilderness to Alaska Visitors

The Alaska Conservation Foundation funded questions on the AVSP specifically to understand visitors' attitudes toward wilderness and the role wilderness plays in Alaska tourism. Visitors were asked questions about:

- Importance of Federal Wilderness in AK trip planning
- Importance of wilderness character in their AK trip
- Importance of wilderness in their lives
- Their expectations for wildlife viewing in AK

How important was the presence of federally designated "Wilderness Areas" to your decision to visit Alaska?

- I didn't know about federally designated "Wilderness Areas" and they were not important to my decision 47%
- I did know about Federally designated "Wilderness Areas" and they were not important to my decision 25%
- Somewhat important, but not a major factor 15%
- Important, but only one of several important factors 8%
- Very important, one of the 2 or 3 most important factors 5%
- The most important factor 1%

Did you visit or travel to view public lands or waters protected as federally designated "Wilderness Areas" during this trip to Alaska?

- Yes 21%
- I think so 21%
- No 38%
- I don't know 21%

Percent of visitors who correctly identified the following places as "Wilderness Areas" that they visited during their Alaska trip:

Denali National Park	13.1
Glacier Bay National Park	8.1
Klondike/Chilkoot Trail Historic Park	0.6
Kenai Fjord National Park	0.6
Wrangell-St. Elias National Park and Preserve	0.5
Katmai National Park and Preserve	0.3
Misty Fjords Monument	1.1
Tracy Arm Fords Terror	0.6

Percent of visitors who incorrectly identified the following places as "Wilderness Areas" that they visited during their Alaska trip:

Mendenhall Glacier	2.0
Kenai Peninsula (general)	1.6
Tongass National Forest (general)	1.2
Klondike/Chilkoot Trail Historic Park	0.6
Haines Bald Eagle Preserve	0.4
Yukon Charlie Recreation Area	0.2
Sitka Totem Park	0.2
Unknown/unclear	3.6

How important was the wilderness character of Alaska in making my decision to visit Alaska?

- The most important factor 16%
- Very important, one of the 2 or 3 most important factors 27%
- Important, but only one of several important factors 20%
- Somewhat important, but not a major factor 20%
- Not at all important 17%

How important was the possibility of seeing or spending time in wilderness places in making your trip plans?

- The most important factor 12%
- Very important, one of the 2 or 3 most important factors 22%
- Important, but only one of several important factors 24%
- Somewhat important, but not a major factor 24%
- Not at all important 18%

In summary, officially designated wilderness is not considered important by visitors but wilderness character is very important with 63 percent saying that attribute was most or very important. Only 17 percent of visitors stated that wilderness character did not matter to them. This suggests that people 1) do not fully understand that wilderness designation is a tool used to preserve wilderness character and/or 2) want land managed as wilderness regardless of whether it has an official wilderness land designation. In addition, visitors were more concerned about protecting and preserving the natural environment and wildlife than providing for solitude.

Table 1.

The Role and Importance of Wilderness to Alaska Visitors					
% of visitors who agree or disagree with statements					
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I do not think the wilderness character of Alaska is important to protect.	3	2	8	37	50
The opportunity to visit or see wilderness would be important to my decision to visit Alaska in the future.	34	39	21	4	2
The use of popular wilderness areas in Alaska should be rationed if needed to protect:					
the natural environment.	31	49	14	4	2
opportunities for visitors to be alone, away from crowds.	16	31	37	12	4
the natural animal populations.	41	43	13	3	1
AVSP data, 2001.					

How did your wildlife viewing opportunities in Alaska compare to your expectations?

- Exceeded my expectations 33%
- About what I expected 42%
- Below my expectations 16%
- I had no expectations 10%

Similar to the Native culture and rural market segments, visitors were divided into "clusters" using statistical cluster analyses based on the answers to the wilderness related questions in the VOS. They broke out into four groups based on:

- Wilderness attachment reflected in travel
- Wilderness emotional commitment
- Use of federally designated wilderness

The characteristics of the four groups:

Group 1:	**H**igh Interest, **H**igh Use	**HH**	**23%**
Group 2:	**L**ow Interest, **L**ow Use	**LL**	**26%**
Group 3:	**M**oderate Interest, **L**ow Use	**ML**	**34%**
Group 4:	**L**ow Interest, **M**oderate Use	**LM**	**18%**

With regards to land management issues, the groups did not differ much in terms of their experience with congestion and development on their current trip. The situation seems tolerable to all of them. The high wilderness orientation group expressed more concern about potential future congestion.

All groups are concerned about over commercialization but especially the high wilderness orientation group. This poses a challenge for outfitter guides because their clients are most sensitive to over development and commercialization. Land management policy and practices that ensure opportunities for wildlife viewing is especially important for the high wilderness orientation group.

- *Is more willing to pay for travel to rural areas*
- *Spends more money on:*
  - *Lodging*
  - *Made in Alaska products*
  - *Tour Packages*
  - *In-State Transportation*
  - *Recreation and Entertainment*
- *Spends more money in total in state.*

However, on a group or individual per day basis, high wilderness interest visitors do not spend significantly more but they stay longer which increases their total expenditures.

Visitor Rural Expenditures

In-state expenditure information was obtained from Alaska visitors completing a daily expenditure diary. Information was logged by expenditure category and location for the traveling party. The location of expenditures is missing on 16% of the over 36,000 records. Of those with locations, 55% occurred in six communities in Alaska—Anchorage (16%), Fairbanks (12%), Ketchikan (9%), Juneau (7%), Skagway (7%), and Denali (4%).[14] Another 3% occurred on or to the Alaska Marine Highway System. Forty-one percent occurred in other Alaska locations. Based on information in visitor expenditure diaries, an estimated $1.8 billion was spent in Alaska in 2000-2001. See Appendix C for more details on rural expenditures.

Table 2.

Visitor Expenditures by Community and Expenditure Category, 2001

(In-state $)	Anchorage	Denali	Fairbanks	Ferry	Juneau	Ketchikan	Skagway	Cruise ship*	Other Alaska	Location Missing	Total	% of Total
Lodging	47,013	7,429	26,660	14,240	16,608	24,686	13,343	967	110,254	39,173	300,373	25%
Food and Drink	32,555	9,943	29,284	3,999	18,425	10,485	10,165	1,835	80,546	23,350	220,587	18%
Transportation	27,002	4,884	22,955	7,375	11,715	10,966	9,788	542	85,631	80,011	260,869	22%
Recreation/Entert.	16,693	7,576	13,717	1,767	5,473	14,134	14,955	1,165	50,837	19,494	145,811	12%
Made in AK/Native arts	6,183	1,108	5,738	1,928	3,216	3,701	9,223	709	13,769	9,654	55,229	5%
Other gifts, souvenirs	12,839	4,261	11,339	1,240	12,535	13,022	10,422	6,302	33,749	16,304	122,013	10%
Clothing	6,086	1,872	2,500	416	2,104	3,149	1,633	535	10,407	1,667	30,369	3%
Personal	4,356	1,588	4,037	259	1,168	1,764	1,982	577	9,974	2,986	28,691	2%
Other	4,373	470	2,254	228	3,093	3,773	632	1,347	12,687	4,743	33,600	3%
Total	157,100	39,131	118,484	31,452	74,337	85,680	72,143	13,979	407,854	197,382	1,197,542	100%
% of Total Known	16%	4%	12%	3%	7%	9%	7%	1%	41%		100%	

*Expenditures on cruise ships are under estimated while expenditures in cruise ports are over estimated based on how people completed the expenditure diary and how information from diaries were compiled in the data records.

Expenditures are based on the 36,364 expenditure records completed by visitors. These are only a portion of what visitors spent in Alaska and are most useful for comparing relative proportions of expenditure categories and locations.

Source: AVSP data, 2001.

Categories of expenditures are shown in Table 3. Lodging, transportation, and food and drink at 25%, 22%, and 18% of in-state expenditures, respectively, account for the largest portion (65%). Made in Alaska, Native arts and other gifts and souvenirs account for another 15%. The Made in Alaska and especially

[14] Expenditures in communities with sizeable cruise ship docking appear to be overestimated because a number of expenditures that occurred on cruise ships were logged by visitors as the location where the ship was docked. The extent to which this inaccuracy occurred is unknown but approximately 1% of in-state expenditures were reallocated to on-board cruise ship expenditures, which is an underestimate.

the Silver Hand (which indicates authentic Native-made arts and crafts) are not well recognized by visitors. More prominent display and promotion of these programs could enhance their benefits to local artisans and businesses, especially in rural Alaska and gateway communities.

Table 3.

Visitor Expenditures by Category, 2001		
(In-state $)		% of
	Expenditures	Total
Lodging	$300,373	25%
Food and Drink	$220,587	18%
Transportation	$260,869	22%
Recreation/Entertainment	$145,811	12%
Made in AK/Native arts	$55,229	5%
Other gifts, souvenirs	$122,013	10%
Clothing	$30,369	3%
Personal	$28,691	2%
Other	$33,600	3%
Total	$1,197,542	100%
Expenditures are based on the 36,364 expenditure records completed by visitors. These are only a portion of what visitors spent in Alaska and are most useful for comparing relative proportions of expenditure categories and locations.		
Source: AVSP data, 2001.		

Visitors were divided by the proportion of their in-state expenditures that occurred in rural Alaska.[15] Groups were categorized as those who had 0% of their expenditures, greater than zero but less than 60% of their expenditures, or greater than or equal to 60% of their expenditures in rural areas. The parties with rural expenditures spent:

- more in Alaska;
- more in Native communities;
- more in communities not accessible by road or ferry;
- significantly more in the Southwest region of Alaska;
- more on in-state transportation, lodging, recreation and entertainment, and Made in Alaska and Native arts and crafts; and
- as would be expected, significantly more in rural Alaska.

The larger the proportion of visitors' expenditures that were rural, the larger their expenditures on Made in Alaska and Native arts and crafts. Less than 2% of all recorded expenditures occurred in non-road connected Native villages. See Table 4 for more details.

Demographically the rural expenditure groups did not vary substantially (Table 5). Surprisingly enough, however, the more rural expenditures, the larger was

[15] Rural was defined as all areas not including: Anchorage, Fairbanks, Juneau, Kenai, Ketchikan, Prudhoe Bay, Seward, Sitka, Whittier, military bases and "suburbs" of major metropolitan areas such as the Matanuska Valley communities of Palmer and Wasilla, and North Pole near Fairbanks.

the average the party size. This could be influenced by the greater proportion of vacation travelers compared to business travelers in the more rural expenditure groups—business travelers' party size tend to be smaller. Students and unemployed people were less likely to have rural expenditures probably because they might not have been able to afford to travel to rural areas. Or they might have traveled to undeveloped rural areas where it was not possible to make expenditures.

The trip characteristics among the rural expenditure groups tended to vary more than the demographics of the groups. As mentioned previously, business travelers had the lowest proportion of rural expenditures followed by travelers who came to visit friends and family and combined business and pleasure travelers. Similarly, people who stayed in Alaska longer tended to have more rural expenditures. Highway travelers were the mode of entry that had significantly more of their expenditures in rural Alaska. Cruise passengers fit in the mid-rural expenditure group, most likely because of the large portion of them who visit Denali National Park and Preserve on land packages; Denali was categorized in this analysis as a rural area.

The numbers in Table 4 are the averages that traveling in that particular expenditure group spent in various locations and by expenditure categories. Visitors were grouped on the basis of their expenditures. Then average expenditures among the groups are contrasted.

As would be expected most rural expenditure groups were summer visitors. There was surprising little variation in terms of whether a visitor had visited Alaska previously or the type of visitor (independent, inde-package or package). If anything, these were counter intuitive with a smaller proportion of independent and repeat visitors constituting the higher rural expenditure categories. This may be because purchasing a lodge or rural vacation package might be the easiest and most economical way to travel to rural Alaska. Information on trip characteristics is shown in Table 6.

Table 4.

Mean Expenditures by Location of Three Rural Expenditure Groups			
(all expenditures are $ per traveling party in various locations)	Rural Expenditure Groups		
	0% rural	>0<60% rural	>= 60% rural
Total instate expenditures	$958	$1,453	$1,285
Instate expenditures in:			
non-Native communities	$844	$1,300	$958
Native communities	$19	$239	$1,131
towns accessible ferry	$713	$530	$469
towns accessible by road	$804	$991	$921
towns accessible by road & ferry	$142	$405	$601
towns not accessible by road & ferry	$1	$269	$1,238
rural communities	$13	$423	$1,003
urban communities	$830	$845	$191
unknown locations	$7	$8	$2
on cruise ships	$7	$8	$2
Expenditures in regions:			
Southeast	$892	$762	$729
Southcentral	$631	$754	$791
Southwest	$5	$376	$1,503
Denali	$94	$208	$533
Northern-Interior	$744	$515	$547
By persons who visited Denali National Park	$1,340	$1,811	$1,981
Average Daily Expenditures	$154	$130	$162
Expenditures on:			
lodging	$469	$437	$667
food/drink	$214	$330	$194
transportation instate	$180	$383	$353
recreation/entertainment	$144	$301	$318
Made in Alaska arts/crafts	$104	$125	$323
Other gifts/souvenirs	$179	$194	$142
Clothing	$104	$94	$68
Personal	$40	$55	$44
Other	$77	$103	$85
AVSP data, 2001.			

Table 5.

Demographics by Rural Expenditure Group			
	Rural Expenditure Groups		
	0% rural	**>0<60% rural**	**>= 60% rural**
	(% breakout into groups based on expenditures)		
Household Size (mean)	2.5	2.2	2.5
Gender			
(% total sample)			
Female	44	47	45
Male	56	53	55
Employment Status			
(% total sample)			
Employed full-time *(44%)*	53	32	50
Employed part-time *(6%)*	6	6	5
Unemployed *(2%)*	1	2	1
Student *(2%)*	3	1	1
Retired *(36%)*	27	47	33
Homemaker *(2%)*	2	3	2
Age of Respondent (mean)	53	59	55
Number in traveling party (mean)	1.8	2.0	2.3
AVSP data, 2001.			

Table 6.

Trip Characteristics by Rural Expenditure Groups			
	Rural Expenditure Groups		
	0% rural	>0<60% rural	>= 60% rural
	(% breakout into groups based on expenditures)		
Winter (Oct.-April, 17%)	64	20	20
Summer (May-Sept., 83%)	36	80	80
Mode of Transportation			
(% total sample)			
Domestic air *(47%)*	67	41	34
International air *(1%)*	2	1	0
Ferry *(1%)*	20	21	16
Cruise ship *(42%)*	10	17	7
Highway *(10%)*	2	22	43
Purpose of Trip			
(% total sample)			
Business only *(23%)*	27	4	5
Business and Pleasure *(7%)*	12	5	5
Vacation and Pleasure *(60%)*	42	84	86
Visit Friends and Relatives *(10%)*	19	7	4
Duration of Trip to Alaska			
(% total sample)			
7 days or less *(54%)*	56	31	54
8-14 days *(31%)*	31	40	29
15-30 days *(10%)*	9	22	13
more than 30 days *(4%)*	3	8	5
Been to Alaska before?			
(% total sample)			
Yes *(42%)*	56	39	52
No *(58%)*	44	61	48
Purpose of Previous Trip			
(% total sample)			
Business only *(10%)*	24	7	5
Business and Pleasure *(8%)*	18	6	12
Vacation and Pleasure *(66%)*	25	59	65
Visit Friends and Relatives *(9%)*	18	14	7
Used to live or work in Alaska *(7%)*	10	3	3
Visitor Trip Type			
(% total sample)			
Independent *(13%)*	60	31	48
Inde-Package *(29%)*	18	35	36
Package *(58%)*	21	34	16
By Region Visited			
Southeast	29	46	24
Southcentral	27	56	18
Southwest	27	36	37
Denali	17	62	21
Northern-Interior	22	56	22
AVSP data, 2001.			

Targeting Cultural, Wilderness and Ecotourism Market Segments

Private Businesses. As mentioned previously, visitors interested in Native culture and visiting rural areas do not substantially differ from nonresident visitors in general in terms of their demographics (Appendix A) but they do differ significantly in terms of their interests (previous section). Marketing to particular age groups, for instance, would not be cost effective. Instead, strategically targeting their interests through clubs and associations they may belong to, specialty retailers, and specialized publications would be more successful and cost effective.

A common complaint of many visitors to Alaska is the difficulty identifying and locating the businesses offering the types of activities and experiences they are interested in doing. There are a number of things that businesses can do to address this difficulty including:

Develop **combination tour packages** that include both Nature/Wildlife and Native Culture. The overlap in these visitor segments provide opportunities for businesses to work together to leverage their resources to reach more potential clients, share clients, and take advantage of the power of word of mouth advertising and return guest loyalty. Tour packaging does not have to be brokered by tour operators in the traditional static fashion (at the wholesale level) but can be directly marketed (at the retail level) by groups of businesses collectively offering activities and custom packaging. Use of the internet can facilitate this effort.

Develop a **comprehensive database and website** for small Alaska rural, cultural, and ecotourism businesses. No single tourism clearinghouse exists where a visitor can find a complete list of tourism businesses in Alaska. Many states have moved to a web-accessible searchable database with activities and geographic location search capabilities with search results linked to tourism businesses' websites. All tourism businesses in the state are included in the database, which advertises for all businesses as well as being more complete and reliable for visitors. The most technologically advanced states are moving to e-commerce booking services via the internet. Establish a single tourism clearinghouse where a visitor can find a complete list of rural, cultural, and ecotourism oriented businesses in Alaska, including a web-accessible, searchable database with activities and geographic location search capabilities with search results linked to tourism businesses' websites. Develop an industry partner to host the site for a minimal annual maintenance fee. A booking or reservation service could ultimately be part of this arrangement with commissions paying for its operation and maintenance of the website. More information on the internet is contained in the next section.

Develop **partnerships** with existing Nature/Wildlife tour businesses. During the recent slump in visitation, partnerships were crucial and made the difference for smaller companies who worked through larger companies and non-profit organizations. The smaller companies offer more visitor opportunities for the client of the larger companies, while the larger companies provide a client, administrative and marketing base. High quality offerings, reliability, and industry standard business practices and accountability are critical to

development of these types of relationships because few companies are willing to risk their reputations through poor client experiences with another company. Today there are approximately 400 businesses providing commercial visitor services in the 15 Alaska national parks. A substantial majority have Alaska business addresses, though many may not be considered local by rural communities near parks. However, recent notable gains for local/Native owned businesses include the Doyon/Aramark joint venture being awarded (2003) the main concession at Denali (principle service is bus transportation, expected to gross $13-20 million annually over the 10 year contract) and the Aramark/Huna Totem joint venture being awarded (2004) the main concession at Glacier Bay (lodging & food, day tour vessel, expected to gross $3-5 million annually over the 10 year contract). Partnering with an established, well financed and experienced business is one avenue for local and Native-owned businesses to win concession contracts. Historic operator status protects Alaska owned Katmailand, Inc. from competition for the main concession at Katmai, the only other Alaska national park with a traditional in-park lodging, food and transportation concession.[16]

Focus products on opportunities for **experience** rather than high-end accommodations. While visitors expect clean and comfortable accommodations, an authentic learning experience is their primary motivation. It is also important that visitor experiences match their expectations and they not be led to expect more than is able to be delivered; do not oversell the product.

Address **transportation concerns** in advertising/literature. While most visitors will not be perturbed by unusual transportation means—and for some this enhances the experience—for about 20 percent of potential rural visitors, transportation by means to which they are unaccustomed such as small planes, four wheelers, snowmobiles, and skiffs would make the experience unacceptable to them. Therefore, it is important to let people know these situations in advance.

Focus advertising on target groups such as travel agents connected to university alumni associations or nature/wildlife travel businesses. The group Educational Travel Connections, previously Non-Profits in Travel, organizes an annual conference that focuses on networking for businesses and communities involved in educational and sustainable tourism.[17] The Educational Travel Connections group would be a productive forum for networking with non-profits that offer trips for their members such as alumni organizations, professional groups, educational organizations such as Smithsonian, specialty retailers such as REI, and conservations groups such as Audubon. Forming a small business marketing consortium could make attendance and involvement with this group more cost effective and affordable.

Federal Agencies. Under the Alaska National Interests Lands Conservation Act (ANILCA), NPS (and presumably other agencies) can give **permitting**

[16] Apgar, Kevin, concession program manager, National Park Service, personal communication, February 2005.
[17] www.travelearning.com

preference to local residents and the Native corporation(s) most directly affected by the establishment of a park area if permits are being offered competitively, but guided fishing and guided sport hunting permits are exempted. This may in part account for the large number of non-resident fishing and hunting guides in rural Alaska who bring clients, materials, and employees to camps and lodges with little or no interaction with local communities or purchases from local merchants. As a result, the experience of many rural communities is that tourism brings impacts to lands and resources valuable to them but provides no commensurate benefits. For example, less than 2 percent of expenditure by visitors to Alaska in 2001 was spent in non-road connected Alaska Native villages. To assist in encouraging more local employment and income, agencies could offer local training workshops for potential business operators to make them more competitive when permits are issued. Agencies could also encourage, through offering additional points on competitive permits, the local purchase of supplies to increase the benefits that might accrue to local communities.

The agencies could become **more informed and involved with regional economic development organizations and planning** to enable better understanding of the impact of their management actions. For instance, the loss of a permit for Glacier Bay National Park by a small cruise ship company that had offered trips in the Bay for many years but could not compete with the per passenger fees offered by the larger vessels led to broader local consequences. This small ship offered natural history and cultural trips which included visits to a number of small Native villages in Southeast Alaska. Glacier Bay is the "anchor" for cruise excursions to Alaska so without this permit, the ship's operator shifted its trips to Eastern Russia. This was a significant blow to the villages that were beginning to offer excursions and Native arts and crafts to these visitors. Without a broader recognition of their role in regional economies and the impacts of what appear to be minor shifts in policy, federal land managers miss the opportunity to cultivate local community and gateway partnerships. If local communities derived more economic benefit from nearby federal lands, it would result in increased sustainability for the community and increased local support for the public lands – a mutually beneficial outcome. To that end, agencies should take into account, to a greater extent, local economic impact as one of many factors which should be considered by park managers.

Develop **local internship programs to train local residents** for professional positions within Parks. Partner with other federal agencies to cooperate on training and sharing employees. Recognize that a rural subsistence lifestyle is important to local residents and plan flexibility into positions to allow both activities to occur. For this endeavor to be successful, however, internships and training will need to be formalized and made a management priority.

Conduct training workshops for outfitter guides type permitted operations to give local residents a competitive edge and also facilitate operations of public lands. Agencies may not have the expertise or resources to do this well, which is one reason that agencies contract with private businesses to provide commercial visitor services rather the government providing them. However, the

agencies could lend support to business development training provided by others by explaining to local businesses what factors the agency considers in managing commercial visitor services and the competitive selection process.[18]

Internet
Travelers' use of the Internet to plan and book their trips continues to grow, albeit at a slower pace, according to the Travel Industry Association of America's (TIA) latest study. Nearly 64 million online travelers—30 percent of the U.S. adult population—used the Internet in the past year to get travel and destination information. Of that group, 44.6 million actually booked at least one travel service or product online in the past year.

The number of Americans using the Internet for travel planning remains stable at 63.8 million, reflecting slower growth in general Internet use among the traveling population. Still, the number of travelers who actually book airline tickets, hotel rooms and other travel services online continues to grow. TIA's recent report shows that nearly 45 million people—nearly three-quarters of all online travel planners—booked travel over the Internet in the past year, up nearly six percent from 2003. And the number of online bookers doing all of their travel booking online continues to grow, with 40 percent now doing so, versus 29 percent a year ago.

Airline tickets continued to be the most frequently purchased travel products online, reported by 82 percent of all online travel bookers, up from 75 percent in 2003. This was followed by accommodations at 67 percent and rental cars/RVs at 40 percent. Compared to a year ago, there was also notable growth in online travel bookers purchasing travel packages (16% vs. 12%) and tickets for tours or excursions (11% vs. 4%). Online travel bookers spent an average of $2,700 in online travel purchases in the past year, up from $2,600 the previous year.

The use of email to market travel promotions has become an effective tool for travel suppliers such as hotels and airlines to generate additional business. Over 36 million online travelers have signed up with a travel supplier website or online travel service to receive email offers and promotions. In addition, nearly 11 million say they have taken a trip they otherwise would not have taken based on an emailed travel promotion, discount or offer.

Alaska visitors, in general, appear to use the internet slightly less than the national average. Of the people who visited Alaska in 2001, 20% saw internet advertising; 5% said it was their most important source of advertising.[19] This may be true on average because of the large number of older tour and cruise ship travelers to Alaska; this age group and type of traveler have lower internet usage rates. But within some visitor segments, internet usage is higher. For example, about a third of all Alaska visitors use the internet as a planning tool,

---

[18] Apgar, Kevin, concession program manager, National Park Service, personal communication, February 2005.
[19] This comparison is somewhat inaccurate, however, because the AVSP data are for 2001 as compared to the TIA internet use study in 2004. Use of the internet is growing so rapidly that the three year span could account for most of the difference.

but this increases to 39% for the cultural market segment and almost half of the high wilderness oriented visitors.[20] For most visitors, use of the internet did not change their plans, travel or spending patterns. This is consistent with research that shows the majority of internet use is to support an already made travel destination decision—people do not sit down to the computer to decide where to travel. Once that decision is made, the internet is used for planning and also booking of travel. About 25% of Alaska visitors used the internet to book travel.

One of the biggest problems reaching customers via the internet, especially for small businesses, is getting lost in the huge number of pages on the web. It has become increasingly imperative to maintain a "fresh" up-to-date and user friendly presence to be effective. This usually requires the help of a professional to optimize the page so it will appear high on a list of sites with search engines. To minimize the cost of maintaining an optimized site, a cooperative portal can be constructed. While this suffers the disadvantage of requiring visitors to "click through" at least once to find a desired business, it allows all the participating businesses to take advantage of the optimization at the lowest cost, without which they might not be reached at all. In most cases for small businesses, the trade off is well worth the "click through" disadvantage.

Denali National Park and Preserve Visitors
The AVSP is a statewide survey of Alaska visitors and is not specifically directed at Denali visitors though Denali is a common destination and is identified in the AVSP. In addition, because almost half of visitors to Alaska travel to Denali, the sample for this area from the statewide survey was sufficient to provide information on this particular park.[21] A traveler survey directed at specific park units would be required to provide sufficient information on parks that do not receive the large volume of visitors that Denali receives. The results on Denali visitor travel patterns and demographics are presented in Tables 6 and 7 below.

Compared to the profile of all visitors to Alaska, in 2001 Denali visitors were somewhat more likely to be highway visitors. In addition, they are almost exclusively vacation and pleasure visitors with significantly fewer of them coming primarily for business or to visit friends and family. Their trips to Alaska are longer than the norm with the majority (53%) visiting Alaska for 8-14 days and another 18% spending more than 15 days in Alaska. Denali visitors on a cruise land package were almost entirely vacation and pleasure visitors; 87% of them visited Alaska for 8-14 days and other 10% spending more than 15 days in Alaska.

Denali visitors are comprised of a high proportion of package and "inde-package" travelers—the latter referring to visitors who are independent travelers who also purchase a travel package for a portion of their trip. Some of these packages could be a short as a day or as long as a week or more; as a result, many visitors to Alaska fall into the inde-package category. Denali visitors are

---

[20] See Appendix D for more details about advertising and internet use.
[21] The AVSP focuses on non-resident visitors to Alaska. As a result, it provides no information on Alaska residents or seasonal employees visiting Denali.

also significantly more likely to have pre-purchased packages for activities in Alaska with approximately half of them doing so compared to slightly less than a third for all Alaska visitors. Well over half of Denali visitors (58%) also plan to purchase day tours or sightseeing trips while in Alaska as compared to slightly more than a third for all visitors. As might be expected, 76% of cruise land tour visitors were on package tours with 59% purchasing packages for activities in Alaska prior to arriving.

Denali visitors are also significantly more likely to be first time visitors to Alaska (73% compared to 58%). If visitors were on a cruise land tour, they were even less likely to be a previous visitor with 81% visiting Alaska for the first time. If they did visit Alaska previously, most came as pleasure travelers or to visit family and friends, with the latter being a higher proportion than the general population of visitors to Alaska.

A higher proportion of Denali visitors were retired, 48% compared to 42% for the general visitor population of Alaska visitors; 60% of visitors to Denali were women. Approximately 70% of land tour visitors were women. Denali visitors are also older but their incomes do not vary significantly from other Alaska visitors, with the vast majority (82%) of Denali visitors having annual household incomes over $50,000. Cruise land tour visitors did not have significantly different incomes or employment status than other Denali visitors. Most Denali visitors are also U.S. residents with an average traveling party size of 2.2 persons, slightly smaller than Alaska visitors as a whole. Additional information on Denali visitors is contained in the tables in the appendices to this report.

Denali visitors were more likely to belong to the "Shopping" Native culture target group than visitors who did not travel to Denali. They were significantly more likely to be part of the "high wilderness" market segment than Alaska visitors who did not travel to Denali. This difference was even more accentuated when comparing cruise ship passengers who visited Denali with cruise ship passengers who did not—the Denali cruise passengers were twice as likely to be in the "high wilderness" segment as the non-Denali cruise visitors. The latter group was significantly less "wilderness oriented" than the average Alaska visitor.[22]

Interestingly, the cruise ship passenger on a land tour that included Denali National Park was just as likely to be of the "high wilderness orientation" as other non-cruise Denali visitors. The four wilderness orientation market segments from "high-commitment-and-high-visitation" to "don't-care-don't-go" tend to break fairly evenly across the population of Alaska visitors. The Denali cruise land tour visitors, however, are a much more bi-modal population with higher proportions on each end of the spectrum. This poses some interesting challenges for the Park Service to manage for this visitor segment. It may be that a portion of Denali visitors are largely first time visitors getting their feet wet so to speak in Alaska, and their experiences on that trip will influence whether they come back. High wilderness types are likely to return for additional visits to Alaska.

---

[22] AVSP data, 2001.

Table 7.

Trip Characteristics Alaska Summer & Denali NP Visitors, 2001			
(percent)		Denali NP	Denali Land
	All Visitors	Visitors	Cruise Tour
% of Alaska visitors who visited Denali	44	--	
Mode of Arrival Transportation			
Domestic air	47	63	71
International air	1	0	0
Ferry	1	2	1
Cruise ship	42	23	28
Highway	10	13	0
Method of Departure from Alaska			
Domestic air	50	53	20
International air	4	6	3
Ferry	1	1	0
Cruise ship	34	27	78
Highway	10	13	0
Purpose of Trip			
Business only	23	3	0
Business and Pleasure	7	2	2
Vacation and Pleasure	60	93	97
Visit Friends and Relatives	10	2	1
Staying additional days beyond business trip	25	7	0
Visited friends & relatives while in Alaska	10	13	8
Duration of Trip to Alaska			
7 days or less	54	30	23
8-14 days	31	53	87
15-30 days	10	15	9
more than 30 days	4	3	1
Visitor Trip Type			
Independent	13	11	3
Inde-Package	29	29	21
Package	58	59	76
Purchased package(s) for activities	30	51	59
Plan to purchase day tours or sightseeing trips while in Alaska	36	58	55
Been to Alaska before?			
Yes	42	27	19
No	58	73	81
Purpose of Previous Trip			
Business only	10	6	5
Business and Pleasure	8	6	5
Vacation and Pleasure	66	62	67
Visit Friends and Relatives	9	21	19
Used to live or work in Alaska	7	5	5
# of previous business trips (mean)	0.4	0.2	0.1
# of previous pleasure trips (mean)	1	1	0.5
Source: AVSP data 2001.			

Table 8.

Demographics of Alaska Summer and Denali NP Visitors, 2001			
(percent)	All Visitors	All Denali NP Visitors	Denali Land Cruise Tour
Mean Household Size	2.4	2.2	2.1
Gender			
Female	59	60	70
Male	41	40	30
Employment Status			
Employed full-time	45	38	40
Employed part-time	3	3	4
Unemployed	1	1	2
Student	1	1	1
Retired	42	48	41
Homemaker	5	3	5
Household Income			
Less than $25,000	3	3	1
$25,000-$49,999	14	15	11
$50,000-$74,999	16	18	15
$75,000-$99,999	12	10	12
More than $100,000	14	12	7
did not answer	42	43	56
Age of Respondent (mean)	56	59	61
Number in traveling party (mean)	2.2	2.1	2.0
Country of Residence			
United States	91	94	95
Canada	8	5	4
Other	1	1	1
Source: AVSP data 2001.			

Rural Sample

In addition to adding questions to the AVSP Visitor Opinion Survey to gather information on visitors' interest in traveling to rural Alaska and interest in Native arts and culture, the 2001 AVSP also included a separate sample of visitors who traveled to rural Alaska during summer 2001. Information on these visitors is contained throughout the appendices; these visitors are identified as the "rural sample".

As a result of the sampling methodology, all rural visitors came in the summer and traveled by domestic airlines because they were only sampled at airports in Alaska. Based on their travel method of departure, they were more likely to be airline travelers. They were also significantly more likely to be vacation and pleasure; less likely to have come primarily to visit friends and family but more likely to visit friends and family while in Alaska. They also took longer trips with a larger portion taking 8-14 day trips than trips 7 days or less in length. They

were also more likely to be traveling on a package but again, this could be as a result of it often being less costly and easier to do a package to rural Alaska than find and book individual components. Rural visitors were approximately twice as likely to have booked packages in advance and plan to purchase day trips and sightseeing while in Alaska. The same percentage had visited Alaska previously but they were more likely to have lived in Alaska previously or come previously for vacation and pleasure. This information supports the notion of a consolidated internet information and booking system for small Alaska businesses, especially those operating in rural Alaska.

The rural sample varied demographically relatively little from the rest of the 2001 visitors to Alaska. A higher percentage of them were male, retired, U.S. residents and they were older on average.

The rural sample tended to plan and book their vacations earlier than other Alaska visitors and also were more likely to use a travel agent. They do not vary significantly in terms of places they would like to visit if they traveled to Alaska again with the exception that they are more likely to want to travel to Southwest Alaska than other visitors. For more details, see the report appendices.

Table 9.

Trip Characteristics Alaska Summer Visitors and Rural Sample*, 2001		
(percent)	All Visitors	Rural Sample
Percentate of Visitors in Rural Sample		25
Mode of Arrival Transportation		
Domestic air	47	100**
International air	1	0
Ferry	1	0
Cruise ship	42	0
Highway	10	0
Method of Departure from Alaska		
Domestic air	50	76
International air	4	3
Ferry	1	1
Cruise ship	34	19
Highway	10	2
Purpose of Trip		
Business only	23	2
Business and Pleasure	7	7
Vacation and Pleasure	60	88
Visit Friends and Relatives	10	3
Additional days added beyond business trip	25	27
Visited friends & relatives while in Alaska	10	18
Duration of Trip to Alaska		
7 days or less	54	40
8-14 days	31	46
15-30 days	10	11
more than 30 days	4	3
Visitor Trip Type		
Independent	13	10
Inde-Package	29	23
Package	58	68
Purchased package(s) for activities	30	65
Plan to purchase day tours or sightseeing trips while in Alaska	36	55
Been to Alaska before?		
Yes	42	42
No	58	58
Purpose of Previous Trip		
Business only	10	6
Business and Pleasure	8	8
Vacation and Pleasure	66	71
Visit Friends and Relatives	9	5
Used to live or work in Alaska	7	11
# of previous business trips (mean)	0.4	0.6
# of previous pleasure trips (mean)	1	2

Source: AVSP data 2001.

* Rural Sample is the group of additional visitors beyond the main AVSP sample who were surveyed to obtain information about people who traveled to rural Alaska during summer 2001.

** % results from sampling methodology, not actual methods of visitor arrival; only sampled air departure locations for rural destination due to cost constraints.

Table 10.

Demographics of Alaska Summer Visitors and Rural Sample*, 2001		
(percent)	All Visitors	Rural Sample
Mean Household Size	2.4	2.3
Gender		
Female	59	49
Male	41	51
Employment Status		
Employed full-time	45	45
Employed part-time	3	1
Unemployed	1	1
Student	1	0
Retired	42	47
Homemaker	5	2
Household Income		
Less than $25,000	3	1
$25,000-$49,999	14	15
$50,000-$74,999	16	19
$75,000-$99,999	12	15
More than $100,000	14	22
did not answer	42	28
Age of Respondent (mean)	56	60
Number in traveling party (mean)	2.2	2.1
Country of Residence		
United States	91	99
Canada	8	1
Other	1	0
Source: AVSP data 2001.		

* Rural Sample is the group of additional visitors beyond the main AVSP sample who were surveyed to obtain information regarding people who traveled to rural Alaska during summer 2001.

References

Alaska Visitor Statistics Program data, 2002.

Bowker, J., *Outdoor Recreation by Alaskans: Projections for 2000 through 2020*, US Forest Service, PNW-GTR-527.

The Ecotourism Society, *USA Ecotourism Statistical Fact Sheet*, 1999. Available at: ecotourism.org/research/stats/files/stats-usa.pdf

Miller, SuzAnne and Daniel McCollum, *Less May Mean More: Maximizing the Economic, Environmental, and Social Benefits from Alaska's Visitors Industry*, A paper presented at a Conference on Alaska's Economy: "Can the Last Frontier Have a Sustainable Future" sponsored by the Alaska Conservation Alliance, July 22, 1999. See also McCollum, Daniel and SuzAnne Miller, 1997, *Alaska Non-resident Visitors: Their Attitudes Towards Wildlife.*

Travel Industry Association of America, *Annual Travel Forecast*, Fall 2004.

Travel Industry Association of America (TIA) and National Geographic Traveler (NGT). "Geotourism: The New Trend in Travel," press release. 8 October 2003. This refers to the second portion of a two-part survey.

Travel Industry Association of America (TIA) and National Geographic Traveler (NGT), *The Geotourism Study: Phase 1 Executive Summary*, 2002. Based on 4300 responses to a survey of 8000 American adults, of which 3,300 had taken a trip in the last three years.

www.travelearning.com

www.ecotourism.org/index2.php?what-is-ecotourism

Appendix A
Alaska Summer Visitor Demographics and Characteristics by Visitor Type and Market Segments

Demographics of Alaska Summer Visitors, 2001	
(percent)	**All Visitors**
Mean Household Size	2.4
Gender	
Female	59
Male	41
Employment Status	
Employed full-time	45
Employed part-time	3
Unemployed	1
Student	1
Retired	42
Homemaker	5
Household Income	
Less than $25,000	3
$25,000-$49,999	14
$50,000-$74,999	16
$75,000-$99,999	12
More than $100,000	14
did not answer	42
Age of Respondent (mean)	56
Number in traveling party (mean)	2.2
Country of Residence	
United States	91
Canada	8
Other	1
Source: AVSP data 2001.	

Demographics of Alaska Summer Visitors and Rural Sample*, 2001		
(percent)		Rural
	All Visitors	Sample
Mean Household Size	2.4	2.3
Gender		
Female	59	49
Male	41	51
Employment Status		
Employed full-time	45	45
Employed part-time	3	1
Unemployed	1	1
Student	1	0
Retired	42	47
Homemaker	5	2
Household Income		
Less than $25,000	3	1
$25,000-$49,999	14	15
$50,000-$74,999	16	19
$75,000-$99,999	12	15
More than $100,000	14	22
did not answer	42	28
Age of Respondent (mean)	56	60
Number in traveling party (mean)	2.2	2.1
Country of Residence		
United States	91	99
Canada	8	1
Other	1	0
Source: AVSP data 2001.		
* Rural Sample is the group of additional visitors beyond the main AVSP sample who were surveyed to obtain information regarding people who traveled to rural Alaska during summer 2001.		

Demographics of Alaska Summer and Denali NP Visitors, 2001		
(percent)	All Visitors	Denali NP Visitors
Mean Household Size	2.4	2.2
Gender		
Female	59	60
Male	41	40
Employment Status		
Employed full-time	45	38
Employed part-time	3	3
Unemployed	1	1
Student	1	1
Retired	42	48
Homemaker	5	3
Household Income		
Less than $25,000	3	3
$25,000-$49,999	14	15
$50,000-$74,999	16	18
$75,000-$99,999	12	10
More than $100,000	14	12
did not answer	42	43
Age of Respondent (mean)	56	59
Number in traveling party (mean)	2.2	2.1
Country of Residence		
United States	91	94
Canada	8	5
Other	1	1
Source: AVSP data 2001.		

Demographics of Alaska Summer Visitors by Travel Mode to Alaska, 2001						
(percent)		Mode of Travel to Alaska				
	All Visitors	Dom. Air	Int. Air	Cruise	Ferry	Highway
Household Size (mean)	2.4	**2.3**	**--**	**2.5**	**2.4**	**2.3**
Gender						
Female	59	53	--	70	58	41
Male	41	47	--	30	42	60
Employment Status						
Employed full-time	45	46	--	45	25	39
Employed part-time	3	2	--	4	17	6
Unemployed	1	1	--	0	0	0
Student	1	0	--	2	0	0
Retired	42	42	--	40	50	51
Homemaker	5	2	--	8	0	3
Household Income						
Less than $25,000	3	4	--	2	0	4
$25,000-$49,999	14	14	--	7	18	37
$50,000-$74,999	16	18	--	12	27	24
$75,000-$99,999	12	14	--	10	9	9
More than $100,000	14	18	--	11	27	9
did not answer	42	32	--	58	18	18
Age of Respondent (mean)	56	58	--	54	56	57
Number in traveling party (mean)	2.2	2	--	2.3	2.6	2.3
Country of Residence						
United States	91	96	--	93	--	62
Canada	8	4	--	7	--	38
Other	1	1	--	0	--	0
Source: AVSP data 2001.						

Demographics of Alaska Summer Visitors by Visitor Type, 2001				
(percent)		Visitor Type		
	All Visitors	Independent	Inde-Package	Package
Mean Household Size	2,4	2.4	2.4	2.4
Gender				
Female	59	48	62	61
Male	41	52	39	39
Employment Status				
Employed full-time	45	52	43	44
Employed part-time	3	10	3	2
Unemployed	1	1	0	1
Student	1	0	0	2
Retired	42	31	43	44
Homemaker	5	3	6	4
Household Income				
Less than $25,000	3	6	1	3
$25,000-$49,999	14	24	12	12
$50,000-$74,999	16	18	15	16
$75,000-$99,999	12	13	8	13
More than $100,000	14	14	19	12
did not answer	42	25	45	43
Age of Respondent (mean)	56	54	55	57
Number in traveling party (mean)	2.2	2	2.3	2.1
Country of Residence				
United States	91	75	92	94
Canada	8	23	7	6
Other	1	2	1	0
Source: AVSP data 2001.				

Demographics of Alaska Summer Visitors and Wilderness Clusters, 2001					
(percent)		*Wilderness Clusters*			
	All Visitors	***High Int. & Use***	***Mod. Int. Low Use***	***Low Int. Mod. Use***	***Low Int. & Use***
Mean Household Size	2.4	2.3	2.3	2.7	2.3
Gender					
Female	59	57	64	56	58
Male	41	43	36	44	42
Employment Status					
Employed full-time	45	50	43	60	32
Employed part-time	3	5	2	3	3
Unemployed	1	2	0	0	1
Student	1	0	2	0	1
Retired	42	35	46	30	54
Homemaker	5	4	1	3	1
Household Income					
Less than $25,000	3	1	3	3	4
$25,000-$49,999	14	15	13	16	11
$50,000-$74,999	16	16	13	21	17
$75,000-$99,999	12	11	13	10	14
More than $100,000	14	18	14	12	12
did not answer	42	38	44	38	42
Age of Respondent (mean)	56	56	57	51	59
Number in traveling party (mean)	2.2	2.1	2.3	2.1	2.1
Country of Residence					
United States	91	96	95	83	89
Canada	8	3	5	16	11
Other	1	1	0	1	1
Source: AVSP data 2001.					

Demographics of Alaska Summer Visitors and Cultural Clusters, 2001				
(percent)				
		Cultural Groups		
	All Visitors	***Fishing***	***Shopping***	***Non-Target***
Mean Household Size	2.4	2.6	2.4	2.3
Gender				
Female	59	54	67	58
Male	41	46	33	42
Employment Status				
Employed full-time	45	40	45	46
Employed part-time	3	2	5	3
Unemployed	1	0	1	1
Student	1	3	0	0
Retired	42	47	37	43
Homemaker	5	5	8	3
Household Income				
Less than $25,000	3	3	4	3
$25,000-$49,999	14	8	15	14
$50,000-$74,999	16	13	14	18
$75,000-$99,999	12	13	13	11
More than $100,000	14	17	15	13
did not answer	42	46	39	41
Age of Respondent (mean)	56	56	56	56
Number in traveling party (mean)	2.2	2.3	2.1	2.1
Country of Residence				
United States	91	89	94	91
Canada	8	11	5	9
Other	1	0	1	0
Source: AVSP data 2001.				

Appendix B
Trip Characteristics of Alaska Summer Visitors by Visitor Types and Market Segments

Trip Characteristics Alaska Summer Visitors, 2001	
(percent)	All Visitors
Winter (Oct.-April)	17
Summer (May-Sept.)	83
Mode of Arrival Transportation	
Domestic air	47
International air	1
Ferry	1
Cruise ship	42
Highway	10
Method of Departure from Alaska	
Domestic air	50
International air	4
Ferry	1
Cruise ship	34
Highway	10
Purpose of Trip	
Business only	23
Business and Pleasure	7
Vacation and Pleasure	60
Visit Friends and Relatives	10
Additional days added beyond business trip	25
Will you visit friends & relatives while in Alaska?	10
Duration of Trip to Alaska	
7 days or less	54
8-14 days	31
15-30 days	10
more than 30 days	4
Visitor Trip Type	
Independent	13
Inde-Package	29
Package	58
Purchased package(s) for activities	30
Plan to purchase day tours or sightseeing	
trips while in Alaska	36
Been to Alaska before?	
Yes	42
No	58
Purpose of Previous Trip	
Business only	10
Business and Pleasure	8
Vacation and Pleasure	66
Visit Friends and Relatives	9
Used to live or work in Alaska	7
# of previous business trips (mean)	0.4
# of previous pleasure trips (mean)	1
Source: AVSP data 2001.	

Trip Characteristics Alaska Summer Visitors and Rural Sample*, 2001		
(percent)		Rural
	All Visitors	Sample
Percentate of Visitors in Rural Sample		25
Mode of Arrival Transportation		
Domestic air	47	100**
International air	1	0
Ferry	1	0
Cruise ship	42	0
Highway	10	0
Method of Departure from Alaska		
Domestic air	50	76
International air	4	3
Ferry	1	1
Cruise ship	34	19
Highway	10	2
Purpose of Trip		
Business only	23	2
Business and Pleasure	7	7
Vacation and Pleasure	60	88
Visit Friends and Relatives	10	3
Additional days added beyond business trip	25	27
Visited friends & relatives while in Alaska	10	18
Duration of Trip to Alaska		
7 days or less	54	40
8-14 days	31	46
15-30 days	10	11
more than 30 days	4	3
Visitor Trip Type		
Independent	13	10
Inde-Package	29	23
Package	58	68
Purchased package(s) for activities	30	65
Plan to purchase day tours or sightseeing		
trips while in Alaska	36	55
Been to Alaska before?		
Yes	42	42
No	58	58
Purpose of Previous Trip		
Business only	10	6
Business and Pleasure	8	8
Vacation and Pleasure	66	71
Visit Friends and Relatives	9	5
Used to live or work in Alaska	7	11
# of previous business trips (mean)	0.4	0.6
# of previous pleasure trips (mean)	1	2
Source: AVSP data 2001.		
* Rural Sample is the group of additional visitors beyond the main AVSP sample who were surveyed to		
obtain information about people who traveled to rural Alaska during summer 2001.		
** % results from sampling methodology, not actual methods of visitor arrival; only sampled air departure		
locations for rural destination due to cost constraints.		

Trip Characteristics Alaska Summer & Denali NP Visitors, 2001		
(percent)	All Visitors	Denali NP Visitors
% of Alaska visitors who visited Denali	44	--
Mode of Arrival Transportation		
Domestic air	47	63
International air	1	0
Ferry	1	2
Cruise ship	42	23
Highway	10	13
Method of Departure from Alaska		
Domestic air	50	53
International air	4	6
Ferry	1	1
Cruise ship	34	27
Highway	10	13
Purpose of Trip		
Business only	23	3
Business and Pleasure	7	2
Vacation and Pleasure	60	93
Visit Friends and Relatives	10	2
Staying additional days beyond business trip	25	7
Visited friends & relatives while in Alaska	10	13
Duration of Trip to Alaska		
7 days or less	54	30
8-14 days	31	53
15-30 days	10	15
more than 30 days	4	3
Visitor Trip Type		
Independent	13	11
Inde-Package	29	29
Package	58	59
Purchased package(s) for activities	30	51
Plan to purchase day tours or sightseeing trips while in Alaska	36	58
Been to Alaska before?		
Yes	42	27
No	58	73
Purpose of Previous Trip		
Business only	10	6
Business and Pleasure	8	6
Vacation and Pleasure	66	62
Visit Friends and Relatives	9	21
Used to live or work in Alaska	7	5
# of previous business trips (mean)	0.4	0.2
# of previous pleasure trips (mean)	1	1
Source: AVSP data 2001.		

Trip Characteristics Alaska Summer Visitors by Travel Mode, 2001						
(percent)		Mode of Travel to Alaska				
	All Visitors	Dom. Air	Int. Air	Cruise	Ferry	Highway
Mode of Arrival Transportation						
Domestic air	47	--	--	--	--	--
International air	1	--	--	--	--	--
Ferry	1	--	--	--	--	--
Cruise ship	42	--	--	--	--	--
Highway	10	--	--	--	--	--
Method of Departure from Alaska						
Domestic air	50	66	50	45	9	6
International air	4	4	50	4	0	1
Ferry	1	0	0	0	36	5
Cruise ship	34	27	0	50	0	0
Highway	10	2	0	1	55	81
Purpose of Trip						
Business only	23	5	--	0	0	0
Business and Pleasure	7	6	--	1	0	3
Vacation and Pleasure	60	85	--	99	82	93
Visit Friends and Relatives	10	4	--	0	18	5
Staying additional days beyond business trip	25	25	--	0	0	50
Visited friends & relatives while in Alaska	10	15	--	2	30	15
Duration of Trip to Alaska						
7 days or less	54	41	50	58	17	38
8-14 days	31	46	50	37	25	28
15-30 days	10	11	0	5	42	24
more than 30 days	4	2	0	1	17	9
Visitor Trip Type						
Independent	13	14	--	4	18	43
Inde-Package	29	21	--	30	82	52
Package	58	65	--	65	0	5
Purchased package(s) for activities	30	62	0	36	27	17
Plan to purchase day tours or sightseeing trips while in Alaska	36	24	0	35	9	9
Been to Alaska before?						
Yes	42	38	--	23	36	40
No	58	52	--	81	60	57
Purpose of Previous Trip						
Business only	10	10	--	10	20	6
Business and Pleasure	8	11	--	0	20	9
Vacation and Pleasure	66	61	--	73	60	75
Visit Friends and Relatives	9	9	--	10	0	9
Used to live or work in Alaska	7	10	--	6	0	0
# of previous business trips (mean)	0.4	6	--	0.1	1	1
# of previous pleasure trips (mean)	1	1	--	0.5	1	4
Source: AVSP data 2001.						

Trip Characteristics Alaska Summer Visitors by Visitor Type, 2001				
(percent)		Visitor Type		
	All Visitors	Independent	Inde-Package	Package
Mode of Arrival Transportation				
Domestic air	47	14	21	52
International air	1	--	--	--
Ferry	1	18	82	0
Cruise ship	42	4	30	65
Highway	10	43	52	5
Method of Departure from Alaska				
Domestic air	50	47	45	54
International air	4	7	3	4
Ferry	1	1	3	0
Cruise ship	34	13	30	40
Highway	10	30	17	2
Purpose of Trip				
Business only	23	13	1	1
Business and Pleasure	7	8	5	2
Vacation and Pleasure	60	68	92	97
Visit Friends and Relatives	10	11	3	0
Additional days added beyond business trip	25	38	27	10
Will you visit friends & relatives while in Alaska?	10	28	14	4
Duration of Trip to Alaska				
7 days or less	54	45	41	52
8-14 days	31	34	36	43
15-30 days	10	16	18	5
more than 30 days	4	4	4	1
Visitor Trip Type				
Independent	13	--	--	--
Inde-Package	29	--	--	--
Package	58	--	--	--
Purchased package(s) for activities	30	0	46	56
Plan to purchase day tours or sightseeing				
trips while in Alaska	36	0	82	58
Been to Alaska before?				
Yes	42	60	33	25
No	58	40	67	75
Purpose of Previous Trip				
Business only	10	11	5	11
Business and Pleasure	8	13	9	4
Vacation and Pleasure	66	50	75	68
Visit Friends and Relatives	9	20	8	5
Used to live or work in Alaska	7	6	3	12
# of previous business trips (mean)	0.4	2	0.5	0.2
# of previous pleasure trips (mean)	1	3	1	0.5
Source: AVSP data 2001.				

Trip Characteristics Alaska Summer Visitors and Wilderness Clusters, 2001					
(percent)		Wilderness Clusters			
	All Visitors	High Int. & Use	Mod. Int. Low Use	Low Int. Mod. Use	Low Int. & Use
Mode of Arrival Transportation					
Domestic air	47	56	45	43	45
International air	1	--	--	--	--
Ferry	1	1	1	1	2
Cruise ship	42	34	45	44	43
Highway	10	9	8	13	11
Method of Departure from Alaska					
Domestic air	50	52	51	56	45
International air	4	3	4	2	6
Ferry	1	1	0	1	2
Cruise ship	34	35	36	27	37
Highway	10	9	7	13	10
Purpose of Trip					
Business only	23	2	1	2	4
Business and Pleasure	7	2	2	5	5
Vacation and Pleasure	60	95	95	89	89
Visit Friends and Relatives	10	2	3	3	2
Additional days added beyond business trip	25	25	20	20	30
Will you visit friends & relatives while in Alaska?	10	11	8	8	11
Duration of Trip to Alaska					
7 days or less	54	39	47	51	51
8-14 days	31	43	42	40	38
15-30 days	10	16	7	8	11
more than 30 days	4	2	5	1	1
Visitor Trip Type					
Independent	13	9	8	19	17
Inde-Package	29	33	28	28	26
Package	58	58	64	53	57
Purchased package(s) for activities	30	62	42	43	39
Plan to purchase day tours or sightseeing trips while in Alaska	36	57	67	52	50
Been to Alaska before?					
Yes	42	29	28	37	34
No	58	71	72	63	66
Purpose of Previous Trip					
Business only	10	6	13	13	6
Business and Pleasure	8	4	6	13	9
Vacation and Pleasure	66	76	60	56	73
Visit Friends and Relatives	9	4	14	15	3
Used to live or work in Alaska	7	11	6	4	8
# of previous business trips (mean)	0.4	0.4	0.3	0.6	0.5
# of previous pleasure trips (mean)	1	1	1	2	1
Source: AVSP data 2001.					

Trip Characteristics Alaska Summer Visitors and Native Culture Clusters, 2001				
(percent)		*Cultural Groups*		
	All Visitors	*Fishing*	*Shopping*	*Non-Target*
Mode of Arrival Transportation				
Domestic air	47	43	53	46
International air	1			
Ferry	1	2	1	1
Cruise ship	42	48	39	41
Highway	10	7	7	11
Method of Departure from Alaska				
Domestic air	50	46	52	51
International air	4	7	2	4
Ferry	1	2	1	1
Cruise ship	34	37	37	32
Highway	10	8	8	11
Purpose of Trip				
Business only	23	2	3	2
Business and Pleasure	7	2	3	4
Vacation and Pleasure	60	94	91	91
Visit Friends and Relatives	10	3	3	3
Additional days added beyond business trip	25	50	20	24
Will you visit friends & relatives while in Alaska?	10	8	11	9
Duration of Trip to Alaska				
7 days or less	54	53	44	48
8-14 days	31	38	40	40
15-30 days	10	9	12	10
more than 30 days	4	1	2	3
Visitor Trip Type				
Independent	13	8	11	15
Inde-Package	29	23	34	29
Package	58	70	55	57
Purchased package(s) for activities	30	48	54	43
Plan to purchase day tours or sightseeing				
trips while in Alaska	36	68	66	52
Been to Alaska before?				
Yes	42	32	28	33
No	58	68	72	67
Purpose of Previous Trip				
Business only	10	10	13	9
Business and Pleasure	8	3	8	9
Vacation and Pleasure	66	67	65	67
Visit Friends and Relatives	9	13	10	8
Used to live or work in Alaska	7	8	4	8
# of previous business trips (mean)	0.4	0.1	0.3	0.5
# of previous pleasure trips (mean)	1	0.7	0.7	1
Source: AVSP data 2001.				

Appendix C
Expenditures and
Rural Expenditure Groups

Mean Expenditures by Location of Three Rural Expenditure Groups			
(all expenditures are $ per traveling party in various locations)	Rural Expenditure Groups		
	0% rural	>0<60% rural	>= 60% rural
Total average instate expenditures	$958	$1,453	$1,285
Instate expenditures in:			
non-Native communities	$844	$1,300	$958
Native communities	$19	$239	$1,131
towns accessible ferry	$713	$530	$469
towns accessible by road	$804	$991	$921
towns accessible by road & ferry	$142	$405	$601
towns not accessible by road & ferry	$1	$269	$1,238
rural communities	$13	$423	$1,003
urban communities	$830	$845	$191
unknown locations	$7	$8	$2
on cruise ships	$7	$8	$2
Expenditures in regions:			
Southeast	$892	$762	$729
Southcentral	$631	$754	$791
Southwest	$5	$376	$1,503
Denali	$94	$208	$533
Northern-Interior	$744	$515	$547
By persons who visited Denali National Park	$1,340	$1,811	$1,981
Average Daily Expenditures	$154	$130	$162
Expenditures on:			
lodging	$469	$437	$667
food/drink	$214	$330	$194
transportation instate	$180	$383	$353
recreation/entertainment	$144	$301	$318
Made in Alaska arts/crafts	$104	$125	$323
Other gifts/souvenirs	$179	$194	$142
Clothing	$104	$94	$68
Personal	$40	$55	$44
Other	$77	$103	$85
AVSP data, 2001.			

Trip Characteristics by Rural Expenditure Groups			
	Rural Expenditure Groups		
	0% rural	>0<60% rural	>= 60% rural
	(% breakout into groups based on expenditures)		
Winter (Oct.-April, 17%)	64	20	20
Summer (May-Sept., 83%)	36	80	80
Mode of Transportation			
(% total sample)			
Domestic air *(47%)*	67	41	34
International air *(1%)*	2	1	0
Ferry *(1%)*	20	21	16
Cruise ship *(42%)*	10	17	7
Highway *(10%)*	2	22	43
Purpose of Trip			
(% total sample)			
Business only *(23%)*	27	4	5
Business and Pleasure *(7%)*	12	5	5
Vacation and Pleasure *(60%)*	42	84	86
Visit Friends and Relatives *(10%)*	19	7	4
Duration of Trip to Alaska			
(% total sample)			
7 days or less *(54%)*	56	31	54
8-14 days *(31%)*	31	40	29
15-30 days *(10%)*	9	22	13
more than 30 days *(4%)*	3	8	5
Been to Alaska before?			
(% total sample)			
Yes *(42%)*	56	39	52
No *(58%)*	44	61	48
Purpose of Previous Trip			
(% total sample)			
Business only *(10%)*	24	7	5
Business and Pleasure *(8%)*	18	6	12
Vacation and Pleasure *(66%)*	25	59	65
Visit Friends and Relatives *(9%)*	18	14	7
Used to live or work in Alaska *(7%)*	10	3	3
Visitor Trip Type			
(% total sample)			
Independent *(13%)*	60	31	48
Inde-Package *(29%)*	18	35	36
Package *(58%)*	21	34	16
By Region Visited			
Southeast	29	46	24
Southcentral	27	56	18
Southwest	27	36	37
Denali	17	62	21
Northern-Interior	22	56	22
AVSP data, 2001.			

Demographics by Rural Expenditure Group			
	Rural Expenditure Groups		
	0% rural	>0<60% rural	>= 60% rural
	(% breakout into groups based on expenditures)		
Household Size (mean)	2.5	2.2	2.5
Gender			
(% total sample)			
Female	44	47	45
Male	56	53	55
Employment Status			
(% total sample)			
Employed full-time *(44%)*	53	32	50
Employed part-time *(6%)*	6	6	5
Unemployed *(2%)*	1	2	1
Student *(2%)*	3	1	1
Retired *(36%)*	27	47	33
Homemaker *(2%)*	2	3	2
Age of Respondent (mean)	53	59	55
Number in traveling party (mean)	1.8	2.0	2.3
AVSP data, 2001.			

Breakout of Rural and Wilderness Clusters into Rural Expenditure Groups			
	Rural Expenditure Groups		
	0% rural	>0<60% rural	>= 60% rural
	(% breakout into groups based on expenditures)		
Cultural Clusters			
Fishing	32	44	24
Shopping	38	44	19
Non-Target	29	44	26
Rural Sample			
Yes	18	46	36
No	34	44	22
Wilderness Clusters			
High Interest & Use	19	60	22
Moderate Interest & Low Use	30	36	34
Low Interest & Moderate Use	29	54	16
Low Interest & Low Use	42	32	27
AVSP data, 2001.			

Visitor Expenditures by Community and Expenditure Category, 2001

(In-state $)	Anchorage	Denali	Fairbanks	Ferry	Juneau	Ketchikan	Skagway	Cruise ship*	Other Alaska	Location Missing	Total	% of Total
Lodging	47,013	7,429	26,660	14,240	16,608	24,686	13,343	967	110,254	39,173	300,373	25%
Food and Drink	32,555	9,943	29,284	3,999	18,425	10,485	10,165	1,835	80,546	23,350	220,587	18%
Transportation	27,002	4,884	22,955	7,375	11,715	10,966	9,788	542	85,631	80,011	260,869	22%
Recreation/Entert.	16,693	7,576	13,717	1,767	5,473	14,134	14,955	1,165	50,837	19,494	145,811	12%
Made in AK/Native arts	6,183	1,108	5,738	1,928	3,216	3,701	9,223	709	13,769	9,654	55,229	5%
Other gifts, souvenirs	12,839	4,261	11,339	1,240	12,535	13,022	10,422	6,302	33,749	16,304	122,013	10%
Clothing	6,086	1,872	2,500	416	2,104	3,149	1,633	535	10,407	1,667	30,369	3%
Personal	4,356	1,588	4,037	259	1,168	1,764	1,982	577	9,974	2,986	28,691	2%
Other	4,373	470	2,254	228	3,093	3,773	632	1,347	12,687	4,743	33,600	3%
Total	157,100	39,131	118,484	31,452	74,337	85,680	72,143	13,979	407,854	197,382	1,197,542	100%
% of Total Known	16%	4%	12%	3%	7%	9%	7%	1%	41%		100%	

*Expenditures on cruise ships are under estimated while expenditures in cruise ports are over estimated based on how people completed the expenditure diary and how information from diaries were compiled in the data records.

Expenditures are based on the 36,364 expenditure records completed by visitors. These are only a portion of what visitors spent in Alaska and are most useful for comparing relative proportions of expenditure categories and locations.

Source: AVSP data, 2001.

Appendix D

Advertising, Information Sources, Planning, Internet Usage, Expectations, Planned and Unplanned Activities

Role of Advertising in the Decision to Visit Alaska

	Cultural Groups			Rural	Wilderness Clusters				All
	Fishing	Shopping	Non-Target	Sample	High Int. & Use	Mod. Int. Low Use	Low Int. Mod. Use	Low Int. & Use	Visitors
Do you recall seeing or hearing any advertising for Alaska in the last 12 months?									
Yes	70	75	66	63	68	70	69	69	69
If yes, where did you see or hear advertising?									
TV	33	32	25	27	30	31	21	29	27
Radio	6	2	3	2	2	3	4	4	3
Magazine	50	55	51	47	56	52	52	50	51
Direct mail	24	31	26	31	26	21	32	28	27
Newspaper	23	24	22	19	19	21	27	24	23
Internet	18	21	16	15	20	22	17	12	17
Which of the above was most important?									
Magazine	11	13	11	12	14	11	11	11	11
Direct mail	4	6	5	6	8	4	4	6	5
Newspaper	2	3	4	2	3	4	3	3	3
Internet	3	4	3	2	3	6	2	3	3
Friends, word of mouth (write in)	7	10	4	5	7	5	5	4	5
Role of Advertising:									
assisted in planning visit	21	30	24	26	30	26	16	30	25
motivated me to visit	18	23	15	18	24	18	13	17	17
caused me to visit sooner	7	12	9	8	13	9	6	10	9
interesting but didn't change my plans	11	15	12	12	13	12	14	12	13
caused me to spend more time in Alaska	4	11	5	7	11	7	3	5	6
caused me to spend more money in Alaska	4	6	5	5	7	4	4	5	5
connected me with planning tools	10	15	12	13	18	13	9	10	12

Source: Alaska Visitor Statistics data, 2001.

Timing of Trip Planning and Travel Arrangements Decision Making									
					Wilderness Clusters				
	Cultural Groups			*Rural*	*High Int.*	*Mod. Int.*	*Low Int.*	*Low Int.*	*All*
	Fishing	*Shopping*	*Non-Target*	*Sample*	*& Use*	*Low Use*	*Mod. Use*	*& Use*	*Visitors*
When decision was made about what season and year to make this trip:									
Less than 1 month	9	9	13	6	5	8	15	18	11
1 to 2 months	12	11	12	6	10	11	15	12	12
3 to 4 months	14	18	16	12	16	16	18	14	16
5 to 6 months	16	17	19	22	16	22	16	20	19
7 to 11 months	24	22	22	31	27	23	19	20	23
1 to 2 years	23	16	14	19	21	16	14	14	16
more than 2 years	2	7	3	5	5	5	4	2	4
When travel arrangements were made:									
Less than 1 month	17	17	21	5	10	15	25	27	19
1 to 2 months	21	23	23	16	24	21	23	22	22
3 to 4 months	15	22	20	25	19	20	20	19	20
5 to 6 months	16	15	20	23	23	19	16	17	18
7 to 11 months	26	19	15	29	20	20	13	14	17
1 to 2 years	4	4	2	2	3	3	4	2	3
more than 2 years	1	0	0	1	1	0	0	0	0
Used a travel agent to assist in planning or arranging trip	54	55	48	63	54	60	40	47	50
Method used to contact travel agent:									
In person	55	48	44	54	53	54	39	36	47
Online/internet	4	11	6	6	5	8	14	2	7
By mail	1	2	3	1	3	1	3	3	3
By telephone	36	34	36	31	31	26	40	50	36
Arrangements made by travel agent:									
Air travel	38	36	38	49	42	30	34	44	37
Train or bus ticketing	12	14	10	16	17	8	8	12	11
Ground transportation	14	15	14	16	18	13	14	12	14
Theater/restaurant ideas or reservations	3	3	2	2	3	3	1	3	3
Accommodations/lodging	19	16	16	25	24	12	13	17	17
Package tours	20	22	16	34	24	12	11	25	18
Cruise bookings	51	48	45	58	49	37	44	56	47
Source: Alaska Visitor Statistics data, 2001.									

Influence of Internet Use on your Alaska Vacation									
					Wilderness Clusters				
	Cultural Groups			*Rural*	*High Int.*	*Mod. Int.*	*Low Int.*	*Low Int.*	*All*
	Fishing	*Shopping*	*Non-Target*	*Sample*	*& Use*	*Low Use*	*Mod. Use*	*& Use*	*Visitors*
If you used the Internet, did you use it:									
to choose Alaska as a destination	4	5	3	3	4	4	3	3	3
as a planning tool to get AK information	31	39	31	28	48	38	21	27	32
as a planning tool to get information about specific businesses in AK	7	9	9	10	9	15	5	6	8
to make travel-related reservations and/or purchases	20	25	23	19	27	26	20	19	23
to pack appropriate clothes & gear for trip	11	18	13	16	20	16	9	13	14
Which of the uses of the Internet was most important?									
as a planning tool to get AK information	17	18	15	12	21	17	11	13	15
to make travel-related reservations and/or purchases	10	13	9	9	12	11	9	10	10
Use of the internet:									
influenced me to stay longer	4	5	3	4	6	4	5	2	4
Influenced me to shorten my trip	0	1	1	0	1	1	0	1	1
cause no change in my plans	49	53	51	52	57	47	56	48	52
Use of the internet:									
influenced me to spend more money	3	4	5	4	6	3	6	2	4
influenced me to spend less money	2	1	1	1	1	1	1	1	1
caused no change in my spending	47	56	49	50	57	46	54	49	44
Source: Alaska Visitor Statistics data, 2001.									

Information Sources Used in Planning or Arranging Your Alaska Vacation									
					Wilderness Clusters				
	Cultural Groups			*Rural*	*High Int.*	*Mod. Int.*	*Low Int.*	*Low Int.*	*All*
Information Source	*Fishing*	*Shopping*	*Non-Target*	*Sample*	*& Use*	*Low Use*	*Mod. Use*	*& Use*	*Visitors*
Alaska Vacation Planner									
used to plan trip	23	26	23	21	35	21	17	21	24
used during trip	18	19	14	13	16	17	16	12	16
somewhat helpful	38	33	35	38	30	34	39	38	35
very helpful	50	46	54	49	55	53	54	44	51
single most important source	15	17	10	11	15	8	8	17	12
Tourism North Planner									
used to plan trip	16	14	13	5	16	14	15	10	14
used during trip	7	8	8	4	9	10	8	5	8
somewhat useful	14	29	27	36	26	18	26	32	25
very helpful	62	56	56	43	50	71	50	71	57
single most important source	14	18	13	7	12	15	17	14	14
Travel books									
used to plan trip	28	36	36	34	47	35	25	33	35
used during trip	16	23	23	18	28	26	14	21	22
somewhat helpful	38	29	28	24	22	25	37	38	30
very helpful	38	46	52	57	53	55	43	42	49
single most important source	7	16	18	19	19	15	11	18	16
Friends or relatives									
used to plan trip	46	47	45	48	46	44	43	50	46
used during trip	17	17	14	18	12	18	18	13	15
somewhat helpful	18	22	21	17	25	18	21	21	21
very helpful	57	51	55	58	58	59	53	49	54
single most important source	27	24	25	30	25	26	35	17	25
Tour co., cruise line, airline									
used to plan trip	36	34	36	48	46	24	30	41	35
used during trip	13	17	15	22	19	13	10	13	15
somewhat helpful	17	14	21	15	16	16	20	22	19
very helpful	62	58	58	65	64	63	55	54	57
single most important source	28	27	28	32	26	27	26	32	28
Unsolicited brochures via mail									
used to plan trip	5	10	7	8	10	4	6	9	7
used during trip	1	2	2	1	3	1	2	1	2
somewhat helpful	50	52	50	43	48	67	58	43	51
very helpful	50	19	21	29	22	33	17	24	23
single most important source	0	5	3	0	4	0	5	0	3

Information Sources Used in Planning or Arranging Your Alaska Vacation (continued)									
					Wilderness Clusters				
	Cultural Groups			*Rural*	*High Int.*	*Mod. Int.*	*Low Int.*	*Low Int.*	*All*
Information Source	*Fishing*	*Shopping*	*Non-Target*	*Sample*	*& Use*	*Low Use*	*Mod. Use*	*& Use*	*Visitors*
Magazine advertising									
used to plan trip	11	11	8	7	14	8	9	6	9
used during trip	3	4	2	3	3	3	2	2	2
somewhat helpful	40	50	47	59	50	57	50	24	47
very helpful	13	31	24	18	22	24	25	29	24
single most important source	0	0	8	6	0	10	5	0	2
Magazine articles									
used to plan trip	9	17	12	15	18	15	10	10	13
used during trip	3	3	2	3	4	3	2	1	3
somewhat helpful	54	51	52	67	56	54	50	44	52
very helpful	23	32	26	23	21	26	32	39	28
single most important source	0	0	6	0	5	6	0	0	3
Newspaper advertising									
used to plan trip	3	5	5	4	4	5	5	5	5
used during trip	2	2	2	0	2	3	2	1	2
somewhat helpful	40	50	49	29	46	33	50	69	48
very helpful	0	0	20	0	18	25	17	0	14
single most important source	0	0	6	0	9	0	8	0	4
Newspaper travel articles									
used to plan trip	5	7	7	4	10	8	5	5	7
used during trip	1	0	1	1	2	1	0	0	1
somewhat helpful	43	54	48	25	50	47	50	50	48
very helpful	43	23	18	38	25	29	10	17	22
single most important source	14	0	13	0	10	12	10	8	10
Alaska Milepost magazine									
used to plan trip	15	20	15	3	20	16	13	16	16
used during trip	11	14	13	3	16	13	10	12	13
somewhat helpful	11	16	16	25	14	20	14	15	16
very helpful	74	64	64	50	58	73	69	63	65
single most important source	47	44	35	25	26	43	41	51	40
Television or travel shows									
used to plan trip	9	11	8	11	17	9	7	4	9
used during trip	0	0	1	1	2	1	0	0	1
somewhat helpful	9	52	44	55	46	67	15	20	42
very helpful	46	24	22	25	9	22	46	70	26
single most important source	0	0	2	5	3	0	0	0	1
No information sources used in planning AK vacation	11	5	16	17	7	10	22	9	13
Source: Alaska Visitor Statistics data, 2001.									

Information Sources Used to Visit Alaska Public Lands									
					Wilderness Clusters				
	Cultural Groups			*Rural*	*High Int.*	*Mod. Int.*	*Low Int.*	*Low Int.*	*All*
Information Source	*Fishing*	*Shopping*	*Non-Target*	*Sample*	*& Use*	*Low Use*	*Mod. Use*	*& Use*	*Visitors*
Alaska Public Lands Info.									
Centers: Tok, Anch., Fair., Ket.									
used to plan trip	5	14	6	6	8	8	10	5	8
used during trip	14	18	15	7	16	17	16	12	15
somewhat helpful	15	15	19	19	19	13	14	32	18
very helpful	46	63	62	61	63	65	57	53	60
single most important source	39	15	12	19	16	10	14	32	16
Community info. centers									
used to plan trip	5	11	7	6	11	6	10	2	8
used during trip	24	30	23	19	24	28	29	17	25
somewhat useful	10	24	21	17	23	21	15	30	21
very helpful	81	53	59	73	56	57	67	52	59
single most important source	24	14	18	17	25	13	20	9	18
Visitor centers in parks, refuges									
& forests									
used to plan trip	14	14	10	11	20	11	8	5	12
used during trip	36	34	26	27	34	29	29	21	30
somewhat helpful	3	21	28	29	25	21	22	23	23
very helpful	70	59	52	58	58	54	59	50	56
single most important source	6	14	16	20	21	8	13	13	15
Internest websites: parks, refuges									
& forests									
used to plan trip	7	12	12	11	16	5	16	6	11
used during trip	2	4	3	3	6	6	4	3	3
somewhat helpful	13	41	27	13	24	22	36	36	30
very helpful	50	46	42	67	55	44	36	36	44
single most important source	25	27	12	40	24	11	11	18	17

Information Sources Used to Visit Alaska Public Lands (continued)									
					Wilderness Clusters				
	Cultural Groups			*Rural*	*High Int.*	*Mod. Int.*	*Low Int.*	*Low Int.*	*All*
Information Source	*Fishing*	*Shopping*	*Non-Target*	*Sample*	*& Use*	*Low Use*	*Mod. Use*	*& Use*	*Visitors*
Pamphlets & brochures from state/federal agencies									
used to plan trip	29	21	18	19	26	20	20	16	21
used during trip	26	26	23	16	21	25	30	19	24
somewhat helpful	17	27	27	18	19	23	23	48	26
very helpful	43	41	45	46	49	42	49	28	43
single most important source	9	11	9	18	6	16	11	5	10
Commercial books & travel guides									
used to plan trip	30	30	27	30	36	30	25	20	28
used during trip	17	21	18	18	26	19	18	11	19
somewhat helpful	16	22	23	22	19	22	23	28	22
very helpful	41	45	42	47	46	37	46	41	43
single most important source	19	13	16	14	13	17	18	19	16
No information sources used in planning AK vacation	38	21	35		18	31	26	49	32
Source: Alaska Visitor Statistics data, 2001.									

What three publications do you read most frequently?									
					Wilderness Clusters				
	Cultural Groups			*Rural*	*High Int.*	*Mod. Int.*	*Low Int.*	*Low Int.*	*All*
	Fishing	*Shopping*	*Non-Target*	*Sample*	*& Use*	*Low Use*	*Mod. Use*	*& Use*	*Visitors*
Financial magazines	13	6	6	9	8	7	9	6	7
Fishing/hunting magazines	9	6	8	11	11	9	7	4	8
Newspapers	36	44	45	46	43	43	44	44	43
National Geographic	13	15	12	14	16	16	9	11	13
Newsweek	10	9	5	6	9	6	5	8	7
Outdoor recreation magazines	5	5	7	6	7	7	7	5	6
Professional journals	7	8	9	8	10	11	8	8	9
Readers' Digest	11	13	11	10	9	9	14	15	12
Time	8	11	10	12	12	9	8	9	10
Travel magazines	10	9	7	6	10	7	6	8	8
Women's magazines	7	7	6	5	6	4	6	7	6
Source: Alaska Visitor Statistics data, 2001.									

What three television programs do you watch most frequently?									
					Wilderness Clusters				
	Cultural Groups			*Rural*	*High Int.*	*Mod. Int.*	*Low Int.*	*Low Int.*	*All*
	Fishing	*Shopping*	*Non-Target*	*Sample*	*& Use*	*Low Use*	*Mod. Use*	*& Use*	*Visitors*
CNN	10	8	8	9	9	9	7	8	8
Discovery Channel	16	12	12	13	19	14	9	9	13
ER	5	7	6	7	6	4	8	7	6
History Channel	10	9	8	7	11	7	9	6	8
Law and Order	8	4	8	8	8	8	6	6	7
Movies	7	9	6	5	9	6	5	7	7
News	30	38	31	36	31	30	31	38	32
Public Broadcasting	13	11	8	10	9	7	10	11	9
Sports	18	9	15	18	14	14	13	17	14
West Wing	6	6	5	6	6	5	4	8	6
Source: Alaska Visitor Statistics data, 2001.									

What prompted you to visit Alaska this year?	
	% of Visitors
Visit friends/family	26
Alaska experience	20
Business travel	15
Scenery	8
Fishing	6
Cruise	6
Recommendations from friends/family	5
Source: Alaska Visitor Statistics Program data, 2001.	

What is the ONE most vivid memory or lasting image from your trip to Alaska?									
					Wilderness Clusters				
	Cultural Groups			Rural	High Int.	Mod. Int.	Low Int.	Low Int.	All
Image	Fishing	Shopping	Non-Target	Sample	& Use	Low Use	Mod. Use	& Use	Visitors
Wildlife	22	24	19	23	32	27	14	13	21
Glaciers	18	15	16	18	17	13	16	18	16
People, family, friends	7	9	6	7	5	8	9	6	7
Source: Alaska Visitor Statistics data, 2001.									

What was the biggest misconception you had about Alaska that was cleared up by your visit?									
					Wilderness Clusters				
	Cultural Groups			Rural	High Int.	Mod. Int.	Low Int.	Low Int.	All
	Fishing	Shopping	Non-Target	Sample	& Use	Low Use	Mod. Use	& Use	Visitors
Vaster than expected	9	4	4	6	5	4	5	5	5
Saw less wildlife than expected	4	3	3	4	4	2	3	3	3
Weather better than expected	17	19	14	14	14	14	15	15	15
Nothing, was as expected	16	19	20	18	15	24	21	17	19
Source: Alaska Visitor Statistics data, 2001.									

Planned and Unplanned Activities

	Cultural Groups			Rural	Wilderness Clusters				All
					High Int.	Mod. Int.	Low Int.	Low Int.	
	Fishing	Shopping	Non-Target	Sample	& Use	Low Use	Mod. Use	& Use	Visitors
Was there anything you planned to do that you did not do?	30	42	35	28	43	37	30	36	36
Recreational activities	4	10	7	6	11	12	4	3	7
Fishing	4	4	6	3	7	4	6	6	6
What prevented you from doing the activity?									
Expense. Money	6	4	5	3	4	8	2	5	5
Time	9	10	11	9	12	12	8	11	10
Wildlife	9	12	8	8	11	8	9	7	8
Did you do anything in Alaska that you did not previously plan to do?	33	42	30	38	42	34	29	32	
Events, cultural or historical	7	7	5	3	8	5	4	6	6
Recreational activities	4	9	6	8	6	5	7	8	7
What influenced you to do this unplanned activity?									
Visitor center referral	7	6	4	1	6	7	4	3	
Suggestion by friend or relative	10	14	10	13	12	10	11	12	11
Rack brochures	7	9	4	6	10	5	4	5	11
Fit into my schedule	10	17	11	12	18	15	10	8	12
Local TV advertising	1	0	1	1	1	0	0	0	0
Local radio advertising	1	0	0	0	1	0	0	0	0
Local newspaper advertising	2	1	1	0	2	0	0	0	1
Activity was affordable	9	10	6	6	11	9	6	5	7
Referral by word of mouth	4	13	6	7	8	8	8	6	7
Referral by hotel employee	2	3	2	5	6	2	0	2	2
Referral by local resident or other employee	6	5	6	4	8	4	4	7	6
Source: Alaska Visitor Statistics data, 2001.									

If you were to take another trip to Alaska, what places would you choose to visit?

	Cultural Groups				Wilderness Clusters				
	Fishing	Shopping	Non-Target	Rural Sample	High Int. & Use	Mod. Int. Low Use	Low Int. Mod. Use	Low Int. & Use	All Visitors
Alaska Highway	17	25	21	17	23	23	20	23	22
Anchorage	30	33	38	33	35	35	39	35	36
Arctic (Nome/Kotzebue)	8	19	15	16	23	12	11	16	15
Barrow	7	11	7	9	12	8	5	7	8
Fairbanks	22	29	28	22	30	23	30	27	27
Glacier Bay	25	31	25	22	30	29	21	27	26
Inside Passage	23	28	24	20	34	23	18	27	25
Juneau	25	25	23	19	26	25	20	25	23
Kenai Peninsula	24	28	23	25	32	26	18	25	24
Mat-Su Valley	1	5	6	2	5	6	4	6	5
Ketchikan	14	19	16	17	19	14	16	17	16
Denali National Park	39	40	43	35	51	44	34	39	41
Whittier	2	5	3	2	6	2	3	2	3
Prince William Sound	14	21	18	18	24	17	16	16	18
Skagway	17	24	17	17	20	17	17	21	19
Sitka	24	29	19	18	26	22	18	24	22
Southwest Alaska	6	12	9	16	16	7	6	8	9
Brooks Range	7	6	8	8	11	8	6	6	7
Aleutian Islands	13	21	15	17	19	17	14	14	16
Western Alaska	3	10	6	5	9	8	4	6	6
Remote Villages	15	29	14	16	20	18	12	19	17
Smaller Communities	10	23	14	15	18	16	13	16	15
Wilderness Areas	25	31	25	25	36	43	13	15	26
Wildlife Refuges	19	29	25	24	41	34	14	18	25
State or National Parks	22	36	31	28	44	37	20	29	31
Scenic Byways	19	33	24	22	30	25	21	27	25
Which ONE of above would you most like to visit?									
Denali National Park	5	13	16	9	15	22	13	13	15
Kenai Peninsula	9	7	6	7	8	5	6	8	6
Inside Passage	5	5	6	6	6	4	7	6	6
Source: Alaska Visitor Statistics data, 2001.									